Slalom's Proposal to the State Bar of California

Admissions Information Management System – RFP Response

April 28th, 2017

slalom

Cover Letter

We are pleased to respond to The State Bar of California's Request for Proposal for an Admission Information Management System.

This is a unique opportunity for The State Bar of California, not just to replace the current Admissions solution, but to become the attorney preferred destination for a connected, collaborative, informative and educational community. Slalom will partner to enable the State Bar's internal team with a next generation configurable platform and automated workflow capabilities to support attorneys from registering for the Bar – to future education needs as they progress in their career.

As a leading consulting firm and a Salesforce Platinum partner – we bring deep platform & integration design, build and deployment expertise coupled with a proven strategy & delivery framework – demonstrated by our recent successes within the industry at Massachusetts Board of Bar Overseers and Law Bulletin / JuraLaw.

We have provided a comprehensive response and proposal based on your RFP and have highlighted key points of our proposal that we believe differentiate Slalom:

We're ready to accompany you in the journey to implement your vision

We took the time to read your documentation, and the detail of your requirements. We understand you are not just providing a site to allow registration and application to exams - You are building a strong and collaborative community for attorneys throughout their career.

Exceptional references & experience

Our work at Massachusetts Board of Bar Overseers gave us critical experience with a very similar project: we will not only build from it, but also leverage the lessons learned. We will spend more time on adding / enhancing functionality, rather that just focus on basic features. For Bulletin Board, we built a solution that 96 of the top 100 Chicago Law Firms depend upon: powerful calendar, case tracking, and deep integration.

Strong ties to the community with our local model and delivery centers

This means that we can reduce overall travel costs and impact on efficiency & availability of resources, but we also are members of the local community and care deeply about it. Your success is important to us – when you succeed – we are there with you.

Shared Values

Our organization was founded on one core value: "*Do the right thing for the client – always.*" This approach guides our commitment to delivering an exceptional outcome for you.

Thank you for your consideration – we look forward to partnering with you!

 We are excited to work with you on this important initiative, and help to turn your vision of supporting attorneys as well as internal stakeholder needs into reality.

Carrie McWilliams
Practice Lead, Customer
Engagement – Los Angeles

Kevin Burdsall
Managing Director – CRM

[1]

EXECUTIVE SUMMARY

1.1 About Slalom - Putting People First

With feet on the ground in 25 markets across North America and the UK, our personal approach to problem-solving ensures that transformation retains its human scale. The end result is deeper, more meaningful connections with customers, happier employees and more resilient solutions that propel you into a brighter future.

A Slalom partnership connects companies to powerful, leading-edge capabilities, aligns organizations to clear courses of action, and builds the skills and mindsets required to embrace new tools and technologies, delivering value long after the end of any engagement.

Constantly innovating on Salesforce, we make the promise of customer success a reality by pushing the limits of what's possible to exceed customer and employee expectations for smarter services and more personalized experiences.

Slalom helps companies move and connect like never before, maximizing the power of technology to serve even greater ends.

https://www.slalom.com/about/our-story

Key Differentiators:
- Local model backed by global delivery teams
- Highly experienced consultants
- Flexible, client-focused delivery
- Do what is right, *always*

Headquarters
Seattle, WA

Offices in
25 markets

Delivery Centers
5 onshore

Employees
4,500+

Clients
1500+

Repeat Clients
90%
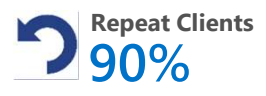
1.1 – About Slalom – Our Services & Offerings

Slalom is a global business and technology consulting firm established in 2001. Our clients hire us to solve their biggest strategic challenges, build smart applications, engage their customers, and organize operations. But that's not the whole story. Our real purpose is to help our people, clients and communities be amazing. We partner with our clients to provide a broad set of technology consulting and business advisory services.

Slalom's services include, but are not limited to:
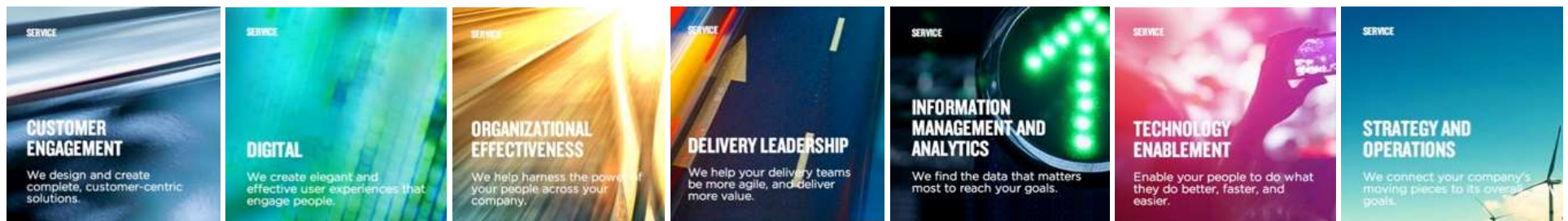
Slalom's core technology platforms are focused on Salesforce, Tableau, Microsoft and Amazon Web Services. In addition, Slalom has built a larger network of platform partners that support our core technology partners. For additional information about Slalom's key partnerships, please visit https://www.slalom.com/work/partners
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We partner with our clients to deliver comprehensive solutions by leveraging our capabilities and deeply-skilled practice areas. We establish seamless teams that deliver high quality focused on outcomes.

1.1 – About Slalom – Our Salesforce Expertise

As a Platinum Salesforce Partner, we employ over 800 Salesforce certified consultants. Slalom became a Salesforce Partner in 2009 and was elevated to Platinum Partner status in 2015 based on our high customer satisfaction ratings (9.8/10), volume of successful projects, and the ability to produce industry assets built on the Salesforce platform.

Salesforce recently named Slalom the **6th largest partner for growth in 2016** within the global ecosystem based on our ability to drive value on the Salesforce platform for our mutual clients. Our Salesforce technologists are well-versed in Salesforce best practices choosing configuration over code where applicable. In areas where code is required, Slalom follows rigorous development operations practices including code review, version control, and continuous integration.

We've delivered 500+ projects with hundreds clients on initiatives leveraging the entire Salesforce platform – from Sales Cloud, Service Cloud and Community Cloud to custom solutions leveraging Force.com and Heroku. While most of our Salesforce projects have a mobile component, we have dozens of Salesforce projects focused on a mobile first strategy. Our work on these projects includes not only the implementation of Salesforce, but an emphasis on the mobile user experience.

We have five (5) established development centers in the US, dedicated to providing a cost-effective blend of resources delivering the highest quality product output.

salesforce platinum consulting partner
9.8/ 10 Customer Satisfaction Rating

550+
Certifications Across the Salesforce Practice

500+
Salesforce Engagements at 100's of Clients

800+
Salesforce Consultants

1.1 – About Slalom – Business Licenses

Copies of business licenses, professional certifications or other credentials, together with evidence that bidder, if a corporation, is in good standing and qualified to conduct business in California.

BUSINESS REGISTRATION CERTIFICATE

	RENEW BY DATE	EXPIRATION DATE
	05-31-2017	06-30-2017

FY 2016-17

BUSINESS ACCOUNT NUMBER	LOCATION ID
0400506	0400506-02-001

TRADE NAME (DBA)	BUSINESS LOCATION
SLALOM CONSULTING	**201 SPEAR ST 1550**

BUSINESS	THIRD PARTY TAX COLLECTOR
SLALOM LLC	☐ PARKING TAX ☐ TRANSIENT OCCUPANCY TAX

SLALOM LLC
821 2ND AVE STE #1900
SEATTLE WA 98104-0000

CITY AND COUNTY OF SAN FRANCISCO
OFFICE OF THE TREASURER & TAX COLLECTOR

José Cisneros
Treasurer

David Augustine
Tax Collector

POST CLEARLY VISIBLE AT THIS BUSINESS LOCATION

Read reverse side. To update addresses or to close a business, go to www.sftreasurer.org/accountupdate.

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BUSINESS TAX CERTIFICATE   CITY OF WEST HOLLYWOOD

The issuance of a Business Tax Certificate does not entitle the holder to conduct any business unless the business is conducted in compliance with City of West Hollywood zoning requirements, and all other applicable laws. The Business Tax was enacted to raise revenue for general purposes and is not a regulatory measure.

Business Name: Slalom LLC
Business Location: 8560 Sunset Blvd, 900 West Hollywood, CA 90069
1st Owner Name: Slalom LLC
2nd Owner Name:

BUSINESS TAX ACCT #: 22776
Description: BUSINESS MANAGEMENT

Effective Date: October 04, 2016
Expiration Date: February 01, 2017

SLALOM LLC
821 2ND AVE 1900
SEATTLE, WA 98104

THIS BOX IS FOR THE BUSINESS TYPE
MESSAGE
Restricted to Certificate holder only

TO BE POSTED IN A CONSPICUOUS PLACE   **NOT TRANSFERABLE**

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● **hdl_noreply@weho.org**   April 25, 2017 at 3:30 PM   H

City of West Hollywood - Business Tax Renewal Accepted

To: *Slalom -- Tax

Dear Slalom LLC

Your renewal for Business Tax Account No. 22776, for Slalom LLC has been approved. Your business tax certificate will be mailed within 15 business days, providing that all inspections have been approved and there are no other outstanding issues pending resolution.

Thank you for doing business in the City of West Hollywood.

Sincerely,

City of West Hollywood
Business Tax Department

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The California Business Search is updated daily and reflects work processed through Sunday, April 16, 2017. Please refer to document **Processing Times** for the received dates of filings currently being processed. The data provided is not a complete or certified record of an entity. Not all images are available online.

200105510026	SLALOM, LLC

Registration Date:	01/29/2001
Jurisdiction:	COLORADO
Entity Type:	FOREIGN
Status:	ACTIVE
Agent for Service of Process:	NATIONAL REGISTERED AGENTS, INC (C1941323)
	*
Entity Address:	821 2ND AVE STE 1900 SEATTLE WA 98104
Entity Mailing Address:	821 2ND AVE STE 1900 SEATTLE WA 98104

1.2 – Our Financials

Slalom, LLC is well capitalized, with a strong balance sheet.

As a privately-owned company, there are no published, publicly available financial statements; however, the Company has generated revenues of $832 million, $707 million, $573 million, and $460 million in 2016, 2015, 2014, and 2013, respectively. Slalom can provide a more specific financial statement at The State Bar's request.

Slalom has demonstrated double digit year-over-year revenue growth – growing organically (no acquisitions) across our 25 local markets

Revenue (Millions)
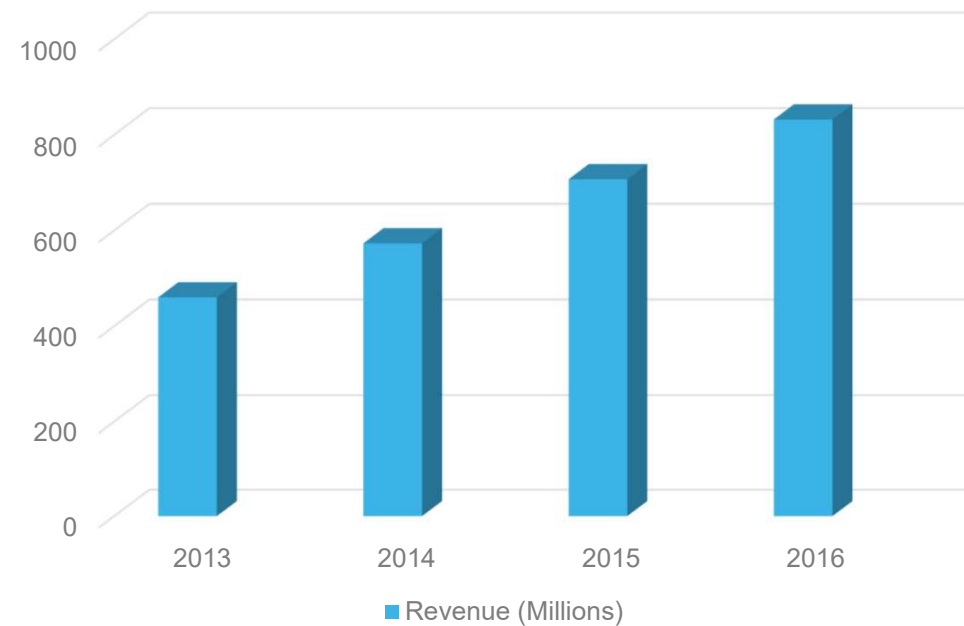
1.3 – Project Qualifications

We have completed many relevant projects, which will allow us to deliver the right solution for the Cal State Bar. We selected the following projects because we feel they are particularly relevant here, as they perfectly demonstrate our ability to accompany Cal State Bar on the journey to reaching your vision.

Massachusetts Board of Bar Overseers selected Salesforce as its chosen software platform to manage attorney registration and citizen complaints. Using Salesforce Service Cloud, attorneys can self-register with the State. Citizens can also use the platform to log complaints against attorneys

Slalom's implementation of Salesforce allowed BBO to migrate legacy files and data into a robust data model and content management solution. Within a month of the solution launch, BBO has experienced 100% Salesforce license utilization across the organization.

Law Bulletin needed to rethink its product strategy and find new ways to monetize content such as attorney profiles, jury verdicts, news, and court information silos across 12 business units

Slalom established a new business and technology platform for cross-selling content in a simple, intuitive, and contextually relevant way. The new platform drastically improved information sharing, and paved the way for a new go-to-market strategy and new revenue channel

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JuraLaw wanted to move from an Illinois only product to become a national product. Slalom created a product based upon the current data available to the public via the New York court websites. The resulting product is a template – driven case/docket management application that provides a unique and exceptional user experience.

Slalom streamlined their data acquisition process as well as refactored their current process to decrease the turn-around time needed in order to bring another state online within JuraLaw.

The product is presented here:
https://www.lawbulletin.com/legal/juralaw

1.3 – Project Qualifications (Cont.)

We have completed many relevant projects, which will allow us to deliver the right solution for the Cal State Bar. We selected the following projects because we feel they are particularly relevant here, as they perfectly demonstrate our ability to accompany Cal State Bar on the journey to reaching your vision.

Western Governors University Slalom offered deep Salesforce.com skills by leveraging their resources from the national CRM team as well as local resources to implement a system to track: Teacher licensure requirements, Student teacher forms, Student forms and notification, Student case management, Vendor contract approval process flow.

Slalom successfully migrated a database of state by state teacher licensure requirements from a legacy system to Salesforce. The project also included tracking student teacher applications, document management, and deadline notifications, as well as capturing student teacher evaluation forms. Other projects included tracking student term break applications, managing student code of conduction violations and appeals, student case management, and vendor contract approval process.

New England Disabled Sports ("NEDS") New England Disabled Sports ("NEDS"), was looking for ways to scale its sports training operations without adding headcount. An antiquated system for managing lesson schedules was difficult to use and maintain, creating a significant hurdle for NEDS to streamline operations. Slalom proposed a Salesforce Community Cloud implementation to enable online self-service for students, caregivers and coaches.

Online checkouts enable students and caregivers to order multiple lessons for multiple students in a single transaction. The solution significantly reduced time spent by NEDS staff to register students and process payments. NEDS staff can now easily adjust coaching assignments on the spot during lesson days using their iPads, creating a better experience for their customers.

1.3 – Project Qualifications – Insights

Over the course of the these engagements – we have successfully implemented projects with similar scope and addressed many challenges – these projects gave us critical experience and insights into your industry – allowing us to not only build from our experience – but to use it as a jumpstart to better understand your needs.

We understand your ecosystem and have helped similar clients unlock significant value with the Salesforce platform –

including highly engaged communities, monetized product offerings and improved service levels and efficiencies with case management

APPLYING OUR EXPERTISE & LESSONS LEARNED

- **Effective and insightful design & decision** making using our industry knowledge and prior client learnings

- Increase attorney community engagement through **effective and intuitive community design**

- **Focus on configuration-first** – identifying Salesforce features and AppExchange packages to best meet your needs

- **Including Change management was an essential component** of the success of the programs

1.4 – Team Profiles

We will assemble a team of highly trained and certified Salesforce and CRM technology experts – based locally in our Los Angeles office in West Hollywood as well as leveraging our national cross-market expertise and delivery centers. The following profiles are representative of the resources we would include on your team.

Carrie McWilliams, Practice Lead

"Our local model allows our practice to be solution builders as well as community partners"

- **12+ years of experience**
- **Solutions:** Salesforce, SAP CRM, Tableau, Eloqua
- **3 Salesforce Certifications**

Joe Frank, Solution Principal

"I ensure our customers' key objectives stay the focus of our delivered solution"

- **12+ years of experience**
- **Solutions:** Salesforce, Eloqua, Ingenius
- **2 Salesforce Certifications**

Fabien Diakhate, Solution Architect

"I design and build foundations that allow future growth of features and leverage standards."

- **10 years of experience**
- **Solutions:** Salesforce, SAP CRM, Dell Boomi
- **8 Salesforce Certifications**

Kris Wood, Solution Integration / UI/UX

"User Experience is underestimated too often in its impact to project success."

- **7 years of experience**
- **Solutions:** Salesforce, Sharepoint, Xamarin, Sitecore
- **1 Salesforce Certification**

Tiffany Chen, Certified SDFC Consultant / Config

"The systems I build address not only current needs but also future features."

- **6 years of experience**
- **Solutions:** Salesforce
- **7 Salesforce Certifications**

Stacy Scherer, CRM Process Expert

"Ensuring the process defined covers all possible scenarios requires method and discipline"
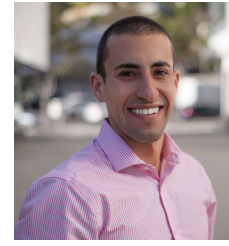
- **7 years of experience**
- **Solutions:** Salesforce, Dynamics
- **PMP, ScrumMaster**
- **1 Salesforce Certification**

Andy Whitehouse, Solution Owner

"I act as a translator between the business and the delivery team in order to ensure alignment toward and invested in a common goal."

- **5 years of experience**
- **Solutions:** Salesforce, Dynamics
- **4 Salesforce Certifications**

Aron Kale, Change Management

"I ensure all stakeholders not only are included, but also feel part of the definition of the to-be solution."

- **5 years of experience**
- **Solutions:** Salesforce
- **2 Salesforce Certifications**

Note: *Detailed profiles available in Appendix*

1.5 – About Salesforce

Salesforce Company Overview

Salesforce is the enterprise cloud computing leader dedicated to helping companies and government agencies transform into connected organizations through social and mobile technologies. Since launching its first service in 2000, Salesforce's list of over 150,000 customers span nearly every industry worldwide. The company's trusted cloud platform is creating a connected government experience for over 1000 government agencies including all Federal cabinet-level Government agencies and 45 out of 50 US States. With the world's leading cloud platform, Salesforce is freeing government data from legacy systems, empowering citizens and connecting agencies to administer government in powerful new ways. Government agencies are using Salesforce solutions for a multitude of government functions including case management, grants management, constituent communications and correspondence management, 311, call/contact center management, licensing, permitting and inspections, outreach programs, learning management, volunteer management, project/program management, and even donor management, among numerous others.

Salesforce was incorporated in Delaware in February 1999, founded on the simple concept of delivering enterprise customer relationship management (CRM) applications via the Internet, or Cloud. Introducing their first service in February 2000, Salesforce initiated one of the most significant paradigm shifts in the computing industry by pioneering the revolutionary idea to deliver enterprise CRM as Software as a Service (SaaS). Salesforce has since expanded its service offerings with new editions, solutions, features, and Platform as a Service (PaaS) capabilities.

Source: Salesforce

1.5 – About Salesforce (Cont.)

Salesforce Offerings

Salesforce service offerings are intuitive and easy-to-use, can be deployed rapidly, customized easily and integrated with other platforms and enterprise apps. Salesforce delivers solutions as a service via all the major Internet browsers and on leading mobile devices. Not only does Salesforce provide enterprise cloud apps, Salesforce also provides an enterprise cloud-computing platform upon which Salesforce customers and partners build and customize their own apps.

Salesforce's vision is based on a multi-tenant technology architecture and a subscription service business model. Salesforce's metadata-driven, multi-tenant cloud runs on a single code base, which enables customers to run their organization on the latest release without disruption. Because Salesforce deploys all upgrades on its servers, new features and functionality automatically become part of the Salesforce service on the upgrade release date and therefore benefit all Salesforce customers immediately. Salesforce continually provides these cloud computing technologies to enterprise customers around the world.

Recognition for Leadership in the Cloud

Salesforce has received multiple awards and recognition for its expertise and leadership in the cloud. From Salesforce's beginnings over 18 years ago, their 150,000+ customers have responded to their cloud computing offerings with overwhelming enthusiasm. Such success has propelled Salesforce to be #1 in Enterprise Cloud Computing and #1 in CRM according to International Data Corporation (IDC). Salesforce also ranks as the Leader in the Gartner Magic Quadrant for "CRM Customer Engagement Centers" (SaaS), "Sales Force Automation" (SaaS), and "Enterprise Platform as a Service" (PaaS). In addition to the recognition from leading Industry Analysts, Forbes Magazine was named "Innovator of the Decade" and has named Salesforce one of the World's Most Innovative Companies for the past six years in a row, 2011-2016.

Source: Salesforce

1.5 – About Salesforce (Cont.)

Rated #1 by IDC, Gartner, and Forrester, the Salesforce Platform has been designed to provide customers with high levels of performance, reliability, and security. Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the service to scale reliably, and cost-effectively to accommodate millions of users. The State Bar will not need to maintain any hardware or software. The Salesforce cloud based architecture will allow the State Bar to deploy the proposed Admissions Information Management solution rapidly and scale at will for future needs.

Gartner	Forbes / Fortune	Gartner / LinkedIn / Forrester
Gartner Leader Sales Force Automation, 2016	**Gartner** Leader CRM Customer Engagement Center, 2016	**Gartner** Leader Enterprise Application Platform as a Service, 2016
FORTUNE 500 Fortune 500 Member	**Forbes** "Innovator of the Decade" 2016 The World's Most Innovative Companies 2011-2016	**FORTUNE 100 BEST COMPANIES TO WORK FOR 2016** #23 Best Places to Work in 2016
2016 CRM MARKET LEADER 2016 Enterprise CRM Suite	**FORTUNE WORLD'S MOST ADMIRED COMPANIES 2016** 2016 Named #34 Most Admired Company in the World	**Linked in** #2 Top Attractors List, 2016
Best Places to Work 2016 #32 Best Places to Work, 2016	**FORRESTER** A Leader Customer Service Solutions For Midsize Teams, Q4 2015	**FORRESTER** A Leader Low-Code Development Platforms, Q2 2016

The Magic Quadrant Gartner reports reflected in this graphic are available upon request from Salesforce. To access these reports, please go to:
http://www.salesforce.com/company/awards/analyst-reports.jsp.

Source: Salesforce

1.5 – About Salesforce (Cont.)

Salesforce Annual Report
The Salesforce annual report is available via the Salesforce public website (http://investor.salesforce.com/about-us/investor/financials/default.aspx)

Salesforce Customer Success Stories
With the world's leading cloud platform, Salesforce is freeing government data from legacy systems and unleashing staff, partners, and citizens to administer government in powerful new ways. In the public sector, Salesforce's trusted cloud platform and applications help government employees and agencies collaborate easily and connect with citizens and partners like never before. Organizations around the globe are leveraging Salesforce's leading cloud solutions and experiencing incredible results ranging from more connected customer service, to streamlined operations, better performance, and overall cost savings.

Over 17 California Government organizations have successfully deployed Salesforce solutions (representing over 30 use cases) including customers such as DMV, Caltrans, CCC, DIR, CalPERS, and recently CDCR, among others.

Notable customer success stories include:
- The Massachusetts Board of Bar Overseers (BBO)
- The State of California Conservation Corp (CCC)
- Massachusetts Department of Early Education and Care
- The Colorado Department of Public Safety reviews
- The California Bureau of Field Enforcement (BOFE)
- State of California, Public Employees' Retirement System (CalPERS)
- Southern California Regional Rail Authority

Source: Salesforce

1.5 – About Salesforce (Cont.)

Massachusetts Board of Bar Overseers (BBO)

BBO was established by the Supreme Judicial Court to investigate and evaluate complaints against lawyers. BBO selected Salesforce as its chosen software platform to manage attorney registration and citizen complaints. Using Salesforce Service Cloud, attorneys can self-register with the State. Citizens can also use the platform to log complaints against attorneys. Complaint cases are vetted for legitimacy and assigned for resolution using automated workflows within Salesforce. Salesforce's robust data and content management capabilities allowed BBO to migrate legacy files and data into the new solution. Ultimately, BBO has consolidated all of its business processes using Salesforce. **Within a month of the solution launch, BBO has experienced 100% Salesforce license utilization across the organization.**

The State of California Conservation Corp (CCC)

CC is the oldest and largest conservation corps program in the United States, hires young men and women who like to work outdoors building trails, planting trees and native plants, landscaping parks, helping with energy conservation, and more. Workers receive a paycheck, have access to scholarship opportunities, and gain valuable work skills to help them transition into the workforce. The CCC was saddled with a cumbersome, paper-based legacy system that required applicants to physically travel to a CCC office to fill out a paper form, and a CCC recruiter to manually enter the data. This process was inefficient and time consuming. Built on the Salesforce Platform in just three short months, the CCC replaced its age-old system with a cloud-based online recruitment tool. The tool, also known as the Corpsmember Recruiting System (CoRe), is an online system that manages recruitment functions and prospect applications letting candidates review program details and apply for positions anytime, anywhere. With Salesforce, the number of applications received increased from 50 per month with the legacy system to 800 per month with CoRe. The solution also provides reporting capabilities allowing CCC staff to filter and drill down data to focus efforts on targeted recruiting areas. **With Salesforce, the agency is now saving time and significant amounts of money.**

Source: Salesforce

1.5 – About Salesforce (Cont.)

The California Bureau of Field Enforcement (BOFE) division of the Department of Industrial Relations (DIR) ensures that employers adhere to labor laws, especially for minimum wage workers. BOFE receives alleged violations of labor laws from employees, advocate groups, and industry associations, conducts investigations and issues citations for violations and wage underpayment. Using Salesforce, BOFE centralized their case management and related processes in a single, collaborative system that dramatically reduced errors and provided easy modification as laws change. Deputy labor commissioners can now view labor law violations, perform inspections, record violations, cite employers for violations, record payments, manage appeals, and track the progress of legal proceedings. **Salesforce allows business users to add new violation types and respond to new legislation without the need for code.**

State of California, Public Employees' Retirement System (CalPERS) is an agency in the California executive branch that manages pension and health benefits for more than 1.72 million California public employees, retirees, and their families. Their mission is to provide responsible and efficient stewardship of the System to deliver promised retirement and health benefits, while promoting wellness and retirement security for members and beneficiaries. CalPERS implemented an investment proposal tracking system developed on the Salesforce Force.com Platform, allowing external investment managers to submit detailed proposals with related information and supporting documentation. The solution improves consistency in capturing relevant data and improves communication between external investment managers and the Investment Office. Through workflow, proposal information is routed to CalPERS Investment staff for consideration and evaluation. **This solution sharpens the CalPERS competitive advantage by ensuring the top investment experts from around the world can reach the CalPERS Investment Office in the quickest, most efficient and secure way possible.**
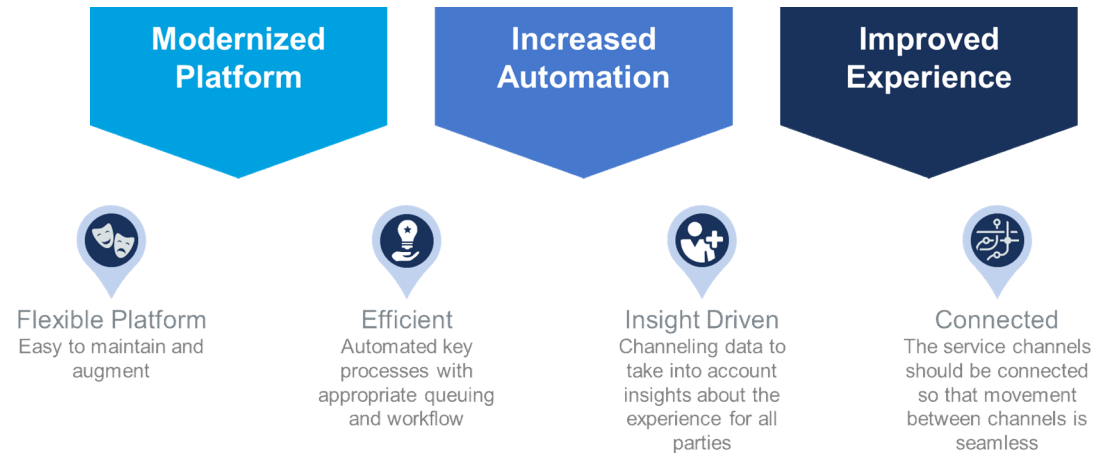
Source: Salesforce

[2]
PROJECT PROPOSAL

2.1 – Our Understanding

The California State Bar Admissions aims to implement a configurable and customizable packaged solution to support the their internal stakeholders and attorney community. Its strategic direction is to migrate from its legacy current systems onto a more current, highly configurable platform or vertical COTS solution that will become the attorney preferred destination for a connected, collaborative, informative and educational community; supporting their needs throughout their career.

CA STATE BAR'S OBJECTIVES

- Implement a configurable and customizable packaged solution
- Increase efficiency and accuracy through automation to reduce manual entry
- Implement workflows to guide users through core admissions process across application, exam development and grading
- Streamline processes to reduce overall cost of admissions to the State Bar
- Establish a strong foundation to support further enhanced functionalities in the future
- Increase collaboration and sharing among staff, public and key stakeholders

KEY OUTCOMES

Modernized Platform	Increased Automation	Improved Experience

Flexible Platform
Easy to maintain and augment

Efficient
Automated key processes with appropriate queuing and workflow

Insight Driven
Channeling data to take into account insights about the experience for all parties

Connected
The service channels should be connected so that movement between channels is seamless
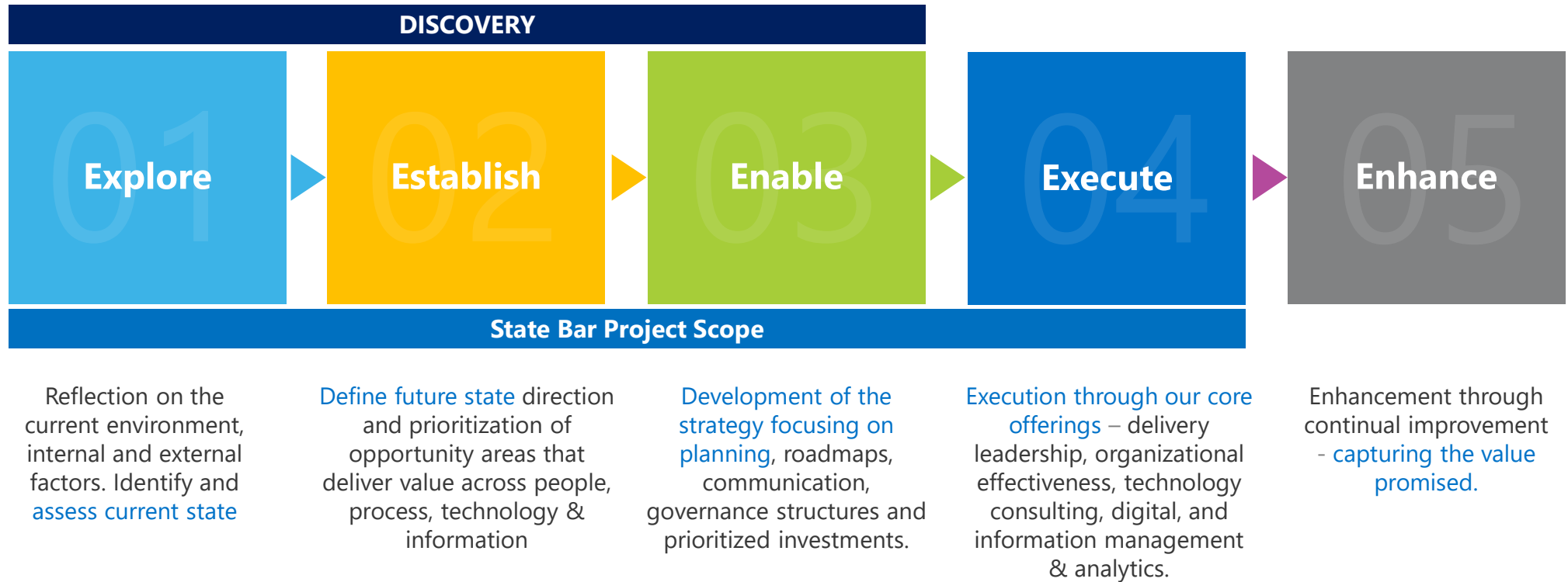
2.2 – Our Approach and Methodology

Slalom will leverage our proven Slalom Strategy and Delivery Framework will be leveraged to achieve your project goals

DISCOVERY

| 01 Explore | 02 Establish | 03 Enable | 04 Execute | 05 Enhance |

State Bar Project Scope

Reflection on the current environment, internal and external factors. Identify and assess current state	Define future state direction and prioritization of opportunity areas that deliver value across people, process, technology & information	Development of the strategy focusing on planning, roadmaps, communication, governance structures and prioritized investments.	Execution through our core offerings – delivery leadership, organizational effectiveness, technology consulting, digital, and information management & analytics.	Enhancement through continual improvement - capturing the value promised.

2.2 – Our Approach and Methodology

Activities - Explore

ACTIVITY	DESCRIPTION
Interviewing stakeholders	The Slalom team meets with key stakeholders that will have critical input to the product from a user experience, requirements, and technical implementation perspective. Stakeholder interviews are used to ensure that the Slalom team is aligned around the product vision and mission. During the first 2 weeks of this phase, these stakeholders are asked about what works, what doesn't, what goals they have, and what success looks like to them. Stakeholders should be identified prior to starting the project, and meetings scheduled ahead of Discovery kickoff. The Slalom team works with the Product Owner to identify these individuals.
Capturing product vision, mission, and objectives	The Solution Owner works with the Client Product Owner to document the project vision, mission and key objectives at the start of the project. A mission statement tells the fundamental purpose of the organization. It concentrates on the present. It defines the customer and the critical processes. It informs of the desired level of performance. A vision statement outlines what the organization wants to be. It concentrates on the future [goal]. It is a source of inspiration. It provides clear decision-making criteria. This activity is facilitated by the Slalom discovery team with members of the business, all at once, or one at a time through the stakeholder interview process.
Assessing current state applications and experiences	The Solution Architect spends time with the technical leads and teams to get an understanding of the current technical landscape. A current state assessment outlines where the current platform/application is today versus it's targeted state. In addition, the Experience Architect will spend time understanding current state related to user experience, such as market analysis, customer/user discovery, product strategy and brand strategy.
Conducting user research	The Experience Architect will lead sessions with individuals or groups of users to determine the context of their interactions within a product. This is also used to validate assumptions and plans for the product experience. These interviews are used in conjunction with client insight to group users by category or persona.

2.2 – Our Approach and Methodology

Activities - Establish

ACTIVITY	DESCRIPTION
Determining target architecture	The Solution Architect develops a target solution architecture and validates it with client technical SMEs. The target architecture is typically focused around the application platform, development language, key frameworks, database technologies, system integrations, security considerations, and infrastructure.
Determining development tool set	The Solution Owner selects and configures the tools that will be used to plan and execute the delivery project. The tool set will enable the planning, managing and tracking of all activity for the project. The Solution Owner can bring our preferred agile toolset and configuration to use, or bring our expertise to the client's existing preferred toolset.
Creating initial product backlog	The Solution Owner establishes an initial product backlog from the first set of requirements that will be expanded upon during this phase. The taxonomy around epics, features, stories and other elements will be established for the project.
Determining & diagraming user workflows	The Experience Architect visualizes the intended workflows of different users of the product. These diagrams capture the ideal workflows of the end user(s) through software by user segment, and are evolved to capture low-level interaction and content states. Diagrams are an essential tool for communicating information architecture and interaction design within the Slalom team, as well as with clients. We use these diagrams to create an application architecture ensures a more succinct and optimized experience for users.
Conducting technical proofs of concepts to validate platform decisions	The Solution Architect conducts small, time-boxed research activities and small proof-of-concepts to validate recommendations for the target architecture. These typically consist of 1-3 day efforts and center around key areas in question for the proposed technical solution.
Determining the QA strategy and approach to testing	The Solution Architect, in collaboration with an experienced QA SME, will determine the overall test strategy and approach based on inputs from the other activities and discussion with the team on the most appropriate way to ensure the product is adequately tested. Decisions will be documented in the Project Test Strategy deliverable which describes the overall approach, tools, timing, processes and other things related to quality assurance for the project

2.2 – Our Approach and Methodology

Activities - Enable

ACTIVITY	DESCRIPTION
Prioritizing the product backlog	The Solution Owner and Product Owner will prioritize the epics, features and stories created during discovery in a series of prioritization sessions. This process helps to surface the most important epics and features to the top of the backlog. The process of priorization and grooming continues as a regular cadence into delivery.
Defining a Minimum Viable Product	The Solution Owner works with the Product Owner to define a Minimum Viable Product (MVP). A MVP is the most pared down version of a product that can still be released to end users. An MVP has three key characteristics: • Customers will use or buy it • Retains early adopters • Provides real user feedback
Creating product road map	The Solution Owner creates a product roadmap for the product that shows MVP in the context of a larger plan. The purpose of a product road map is to communicate direction and progress to internal teams and external stakeholders. It should not include every feature in the product backlog, or a list of specific engineering bugs. The road map is a product management document and should live separately.
Estimating stories in the backlog	The project team conducts several estimation sessions to understand the level of effort of items in the backlog prioritized for MVP. The team uses a t-shirt sizing estimation approach to provide high level estimates for the items included in MVP. This activity helps inform the implementation plan to bring the right size team to work with the client for delivery.
Defining the delivery team	The Solution Owner works with the Solution Architect and Experience Architect to help define the team needed for delivery based on the level of effort outlined in MVP. The team works the client to determine the roles that client team members will play in the delivery phase alongside Slalom team members.

# 2.2 – Our Approach and Methodology – Discovery Objectives

In collaborative design and build workshops, Business & Technology stakeholders make real-time decisions aligning business processes to native Salesforce.com capabilities, while anchoring decisions on business value. In addition to workshops – we will complete a POC to validate the Salesforce HEDA app exchange product against the State Bar's requirements.

Define future state processes & design

Align to native / "out of the box" Salesforce.com capabilities
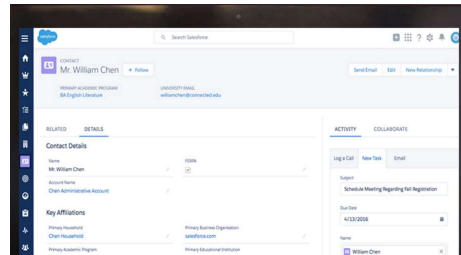
Manage the entire attorney - journey from prospect/ student to alumni to practicing professional. **Salesforce HEDA** provides a holistic view of relationships to allow attorneys to grow their career and connect to peers

Prioritize any potential customization based on value and impact

2.2 – Our Approach and Methodology – Change Management

Slalom's **Change Management Framework** consists of four key disciplines which will prepare the State Bar of California's stakeholders for the changes and challenges associated with the AIMS Program. These disciplines are seamlessly incorporated throughout project execution & delivery.

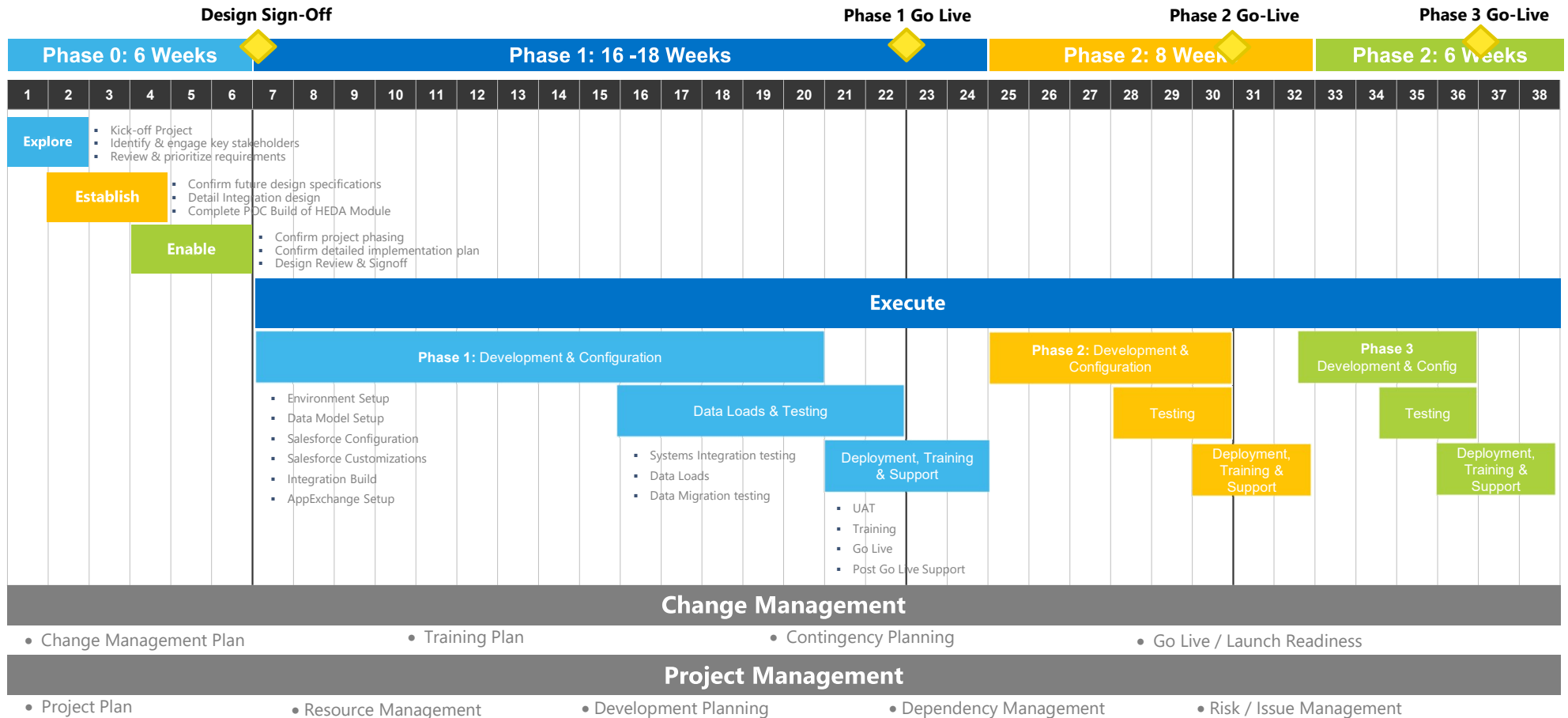| **1**	**2**	**3**	**4**
Organizational Readiness	**Engagement & Sponsorship**	**Communication**	**Learning**
Understand the current environment in order to identify the optimal approach for driving change, and develop the infrastructure to sustain the change.	Identify and actively engage leaders and other key resources to serve as advocates and drivers of the change. Foster buy-in to ensure the change sticks.	Raise stakeholder awareness and understanding of the change by providing the right information at the right time, leveraging key messages and channels tailored to the target audience.	Identify strategies to educate impacted audiences on how their day-to-day work will change and develop the skills needed to adapt to the changed environment.

2.3 – Proposed Timeline – Phased Approach

Slalom will leverage a phased approach to deliver project required capabilities – allowing State Bar adequate time to review, assess, test and stabilize with each phase. This phasing and detailed functionality will be validated during design.

	Purpose	Scope
Phase 0: **Discovery**	Define future state design & functionality for CA State Bar – focusing on attorney & stakeholder experience and community engagement	• Complete future design specifications • Detail Integration design • Complete POC Build of HEDA Module • Confirm project phasing & detailed implementation plan
Phase 1: **Foundation** *Service Cloud,* *Communities*	Lay the foundation to achieve project vision by building an extendable solution that delivers immediate value	• Community for students and Bar members; List of schools • Applications management: submission, status tracking and processing, Moral Character Investigation • Most applications types: requests, appeals, TA, FLC, etc. • Document Management, Master Calendar, Automation
Phase 2: **Extend** *Exam questions, Grading*	Extend platform to support exam questions gathering and processing, exam grading and event management	• Service & Community Enhancements • Questions processing, Pretesters • Grader selection, Exam Grading, CBX, FYLSX • Remaining Applications and Requests types • Event Management, Contracts, Facilities tracking • Schools regulations
Phase 3: **Extend** *Logistics, Specializations*	Extend platform to support management of logistics and legal specialization programs	• Exam Event Management • Master rental contracts for exam facilities • Proctors Management (scheduling, assigning, skills) • Exam Materials Inventory, shipment, tracking • Legal Specialization qualification tracking, re-cert.; Interest tracking

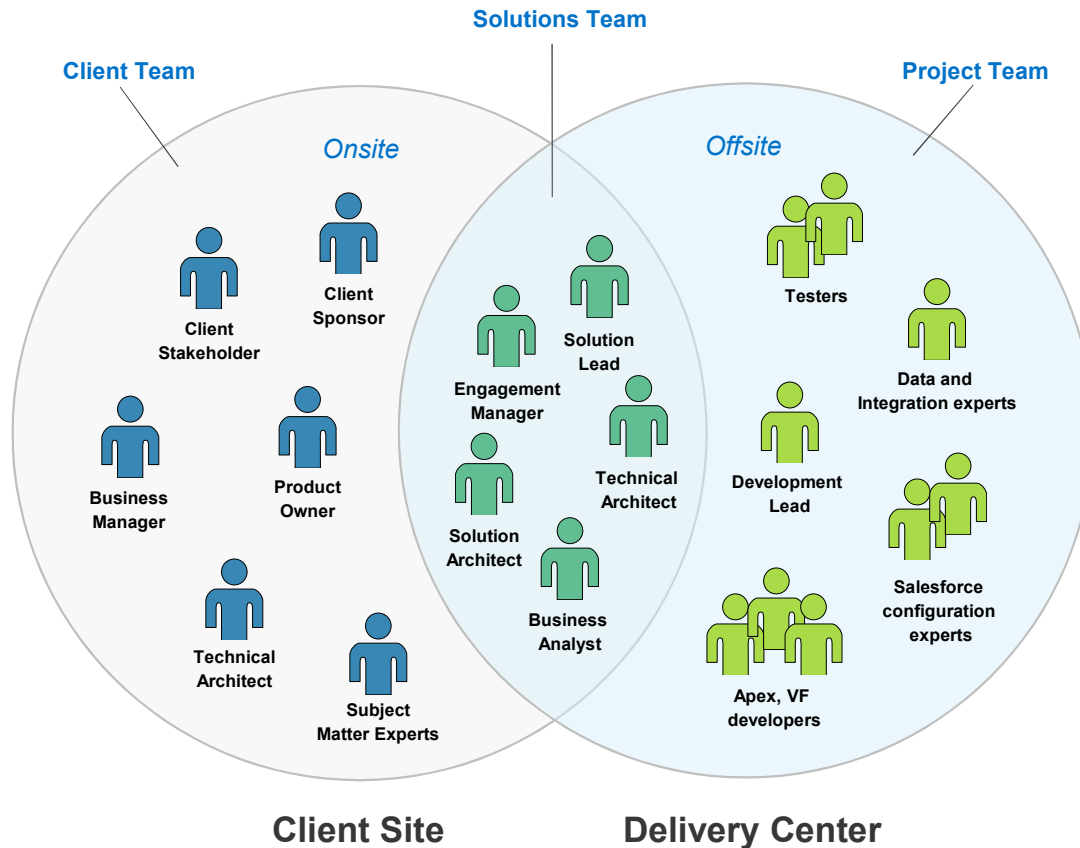# 2.3 – Proposed Timeline – Detailed Timeline

Project will be delivered in three phases over the course of 9-10 months – with the first phase focused on foundational activities.

Design Sign-Off | **Phase 1 Go Live** | **Phase 2 Go-Live** | **Phase 3 Go-Live**

Phase 0: 6 Weeks	Phase 1: 16 -18 Weeks	Phase 2: 8 Weeks	Phase 2: 6 Weeks

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 |

Explore
- Kick-off Project
- Identify & engage key stakeholders
- Review & prioritize requirements

Establish
- Confirm future design specifications
- Detail Integration design
- Complete POC Build of HEDA Module

Enable
- Confirm project phasing
- Confirm detailed implementation plan
- Design Review & Signoff

Execute

Phase 1: Development & Configuration
- Environment Setup
- Data Model Setup
- Salesforce Configuration
- Salesforce Customizations
- Integration Build
- AppExchange Setup

Data Loads & Testing
- Systems Integration testing
- Data Loads
- Data Migration testing

Deployment, Training & Support
- UAT
- Training
- Go Live
- Post Go Live Support

Phase 2: Development & Configuration

Testing

Deployment, Training & Support

Phase 3 Development & Config

Testing

Deployment, Training & Support

Change Management
- Change Management Plan
- Training Plan
- Contingency Planning
- Go Live / Launch Readiness

Project Management
- Project Plan
- Resource Management
- Development Planning
- Dependency Management
- Risk / Issue Management

2.3 – Proposed Team - Structure

Slalom provides a highly skilled solutions team with access to our extensive cross-market experts and delivery centers to scale project to best meet your needs and delivery timeline.

Solutions Team

Client Team

Project Team

Onsite

Offsite

Client Stakeholder

Client Sponsor

Testers

Engagement Manager

Solution Lead

Data and Integration experts

Business Manager

Product Owner

Development Lead

Technical Architect

Solution Architect

Salesforce configuration experts

Technical Architect

Business Analyst

Subject Matter Experts

Apex, VF developers

Client Site

Delivery Center

Benefits

- Salesforce configuration, development, data, testing and administration expertise
- Enable blended delivery teams with onsite and remote Salesforce expertise to accelerate development with agile and hybrid methodologies to generate faster time to market, higher visibility, more flexibility and increased customer satisfaction
- Enjoy competitive, flexible pricing models to enable greater margin benefit without diluting quality

2.3 – Proposed Team – Roles

Slalom proposes the following team roles for this engagement

Role	Responsibilities	
Engagement Manager	▪ Owns overall accountability for the successful delivery of the project ▪ Plan and manage the project throughout the full delivery lifecycle	▪ Manage delivery risks, dependencies, deliverables and resolve project issues ▪ Participates in steering committee meetings
Salesforce Solution Architect	▪ Application architect for the team, defining the technical direction for development solutions ▪ Work with State Bar IT and Architect stakeholders to align technical integrations (enterprise integration, environments, development)	▪ Establish and manage architecture environments (dev, test, prod) ▪ Completes POCs to refine and improve technical architecture
Salesforce Solution Owner	▪ Work with State Bar IT, Business and Architect stakeholders to ensure alignment of the solution vision ▪ Owns the definition of the MVP design	▪ Establishes and maintains project governance and cadence as well as directly manage the effort
Salesforce Senior Business Analyst	▪ Configure Salesforce to address business requirements; produce requirements documents and design	▪ Support Functional System Test, SIT and UAT ▪ Support Training (Train the Trainer) Activities
Salesforce Developers	▪ Develop core Salesforce solution (Apex development, workflow, validations, triggers, security, sharing rules, custom objects)	▪ Perform unit/SIT testing
Integration & Data Migration Developer	▪ Implement the data model and data schedule; implement the integration security requirements around the integration points ▪ Provide sample data for integration components adhering to data model;	▪ Design data flows and data schemas / tables ▪ Document and layout ETL API requirements ▪ Perform unit/SIT testing
Experience Design Architect	▪ Design the solution for maximum usability (optimized user experience) ▪ Design and mockup Salesforce Community	▪ Develops, produces, and iterates user flows, wireframes, navigation maps, information architecture diagrams
Change Management Lead	▪ Define the Change Management Plan; Go-live planning, support train-the-trainer, program communications and end user adoption	

2.4 – Cost Estimates – Professional Services

Slalom estimates for professional services detailed below – including total cost by phase. Estimates will be reviewed and re-validated at completion of phase 0 for remainder of engagement.

	Slalom Professional Services	SDFC Licensing*	Total Cost
Phase 0 - Discovery – 6 weeks	.23M	-	.23M
Phase 1 – Foundation – 16-18 weeks	1.3M	.19M	1.49M
Phase 2 – Extend – 8 weeks	.49M	N/A	.49M
Phase 3 – Extend – 6 weeks	.24M	N/A	.24M
Total	2.27M	.19M	2.46M

Estimates are approximated.
Expenses will be billed as actuals.

Note: *Estimates to be re-validated at completion of Phase 0*

2.4 – Cost Estimates – Salesforce Licensing

Salesforce license estimates by license type (as provided by Salesforce estimate to CA State Bar):

License Type	RFP Estimated Total Users	Phase 1 Users	Phase 2 Users	Phase 3 Users	Total Estimated Costs	Notes
Salesforce Service Cloud	70	70	70	70	$97K	Internal users
Customer Community Login User	10K / Monthly	10K / Monthly*	TBD*	TBD*	$41K	Law Students, lawyers. *To be confirmed during discovery
Government Cloud	$48,237	$48,237	$48,237	$48,237	$48,237	
Community Plus	TBD*	TBD*	TBD*	TBD*	TBD*	Dependent on data / access given to pre-testers, graders, etc. *To be confirmed during discovery
					$186K	

Assumptions:
- State Bar of CA will purchase any Salesforce licenses directly from Salesforce to support this project
- Slalom Consulting is not responsible for licensing terms with Salesforce
- Exact license numbers will be confirmed during discovery

Source: Salesforce

[3]

RFP REQUESTED DOCUMENTATION

3.1 – Acknowledgements

Slalom acknowledges receipt of the Contracting Requirements set forth in section IV of the State Bar RFP, pending final confirmation by our Legal team. Additional comments provided below.

Solicitation paragraph	Assumption or Exception Response
Section IV. Contracting Requirements	Salesforce has included its master subscription agreement. The master subscription agreement includes the contract terms for all of Salesforce's services. Due to Salesforce's unique technology and subscription-based model, purchases of Salesforce products must utilize the master subscription agreement. Slalom also has a Master Services Agreement – which will be provided if selected.
Section IV. Contracting Requirements **B. Warranties and Representations** 5. Vendor represents and warrants that it will deposit, as new versions are released, the Software source code into escrow pursuant to a software escrow agreement with a third party escrow agent. State Bar shall become a beneficiary under the agreement upon execution of the agreement. Vendor will pay all required fees under the software escrow agreement. State Bar will have the right to receive the source code of the Software licensed upon the occurrence	Salesforce is providing a cloud-based SaaS solution that will be configured to meet the State Bar's specific requirements. Salesforce is not creating any new Intellectual Property for the State Bar. The State Bar would own the State Bar's data. Salesforce would be responsible for maintaining access in terms of performance and availability to the State Bar's data. The State Bar would have access to its data and metadata, but not all of the Salesforce PaaS and SaaS underlying solution source code. The State Bar has full rights to extract its data at anytime during the subscription service via Export Services utilities including: weekly export, data loader, APIs, EAI tools, etc. However, Salesforce does not typically offer full system source code because it is inapplicable to software delivered as a service subscription through a multitenant architecture. Salesforce is happy to discuss further with the State Bar why the concept, while relevant in traditional on premise, perpetual license software, does not make sense in a cloud-computing model such as that of Salesforce. While it is possible to provide the source code in an escrow account for a configured solution, the source code would only be able to operate in Salesforce's PaaS/SaaS environment. The State Bar's data can be exported during the subscription service as needed. In addition, all application meta-data, including data objects, configurations, code, permissions, etc., is available for export using the Meta-data API, Force.com IDE and/or the Force.com Migration Tool.

3.1 – Acknowledgements (Cont.)

Slalom acknowledges receipt of the Contracting Requirements set forth in section IV of the State Bar RFP, pending final confirmation by our Legal team. Additional comments provided below.

Solicitation paragraph	Assumption or Exception Response
Section IV. Contracting Requirements. K. General Provisions 3. Audit. The State Bar reserves the right to have an independent audit conducted of Vendor's compliance with the terms of the final Agreement if the State Bar reasonably believes such audit is necessary to ensure confidentiality and or financial or program accountability or integrity. Accordingly, Vendor agrees that the State Bar or its designated representative will have the right to review and to copy any records and supporting documentation pertaining to the performance of the final Agreement. Vendor agrees to maintain such records for possible audit for a minimum of two (2) years after final payment, unless a longer period is stipulated. Vendor agrees to allow interviews of any employees who might reasonably have information related to such records. Further, Vendor agrees to include a similar right of the State Bar to audit in any subcontract related to the performance of the final Agreement.	Salesforce does not typically offer a Right to Audit clause as part of the base service offering. Salesforce is a multi-tenant cloud service. Annual site visits can be negotiated, but in consideration of our other customers, random access cannot be permitted. As a multi-tenant service, compartmentalization is virtual, not physical. Salesforce contracts with third party auditors to inspect and review our security. The results of these audits can be provided to the State Bar as desired and under NDA. Salesforce has comprehensive privacy and security assessments and certifications performed by multiple third parties, including ISO 27001, SSAE 16 SOC 1, SOC 2, SOC 3, PCI-DSS, and FedRAMP. Third party auditors test the effectiveness of Salesforce's security controls as it relates to each of the compliance frameworks mentioned above. Salesforce provides contractual assurance to its customers that the Customer Data hosted in Salesforce's services will be kept confidential. Salesforce provides information about the architecture, security and privacy of the Salesforce service here: https://help.salesforce.com/apex/HTViewHelpDoc?id=security_overview.htm&language=en_US

3.2 – Reseller Certification

Slalom is proposing Salesforce as the SaaS/PaaS solution to achieve the State Bar's solution requirements.

In order to provide the greatest flexibility and value to State Bar, we are proposing decoupling the SaaS/PaaS solution licensing from the implementation services, and form two separate agreements; one for licensing and one for implementation services, rather than combining both as a single contract award. This will allow the State Bar to maintain ownership over the SaaS/PaaS licensing agreement, and data rights at the onset to ensure that the government has the maximum control and visibility over its operations and subscriptions in the future years.

Therefore, we have not included a Reseller Certification since Salesforce is the software vendor and will be selling licenses directly to the State Bar and not through a reseller.

3.3 – Third Party Audit

Salesforce.com incorporates OWASP recommendations and other security best practices into its system development processes at all stages. In addition - they regularly use third parties to evaluate the security of our solutions. These reports are available to prospects and customers under a non-disclosure agreement. Per the Questions and Answers released on April 4, 2017, we understand this approach is acceptable to the State Bar.

Security & Salesforce

Salesforce.com's services are certified as compliant with some of the most rigorous, industry-accepted security, privacy, and reliability standards. They are certified and audited to standards as a service provider with the ISO/IEC 27001:2005 standard (including ISO 27001), SAS 70 Type II (now SSAE No. 16), SysTrust, and the EU-US and Swiss-US Safe Harbor frameworks). Our customers can also use our cloud services to deliver solutions that comply with HIPAA, PCI DSS, and FISMA (moderate level). Additional information about salesforce.com's security and privacy programs is available at http://trust.salesforce.com.

Source: Salesforce

[4]

PLATFORM DETAILS

4.1 – Proposed Platform - Salesforce

Based on our understanding of your project and your specific objectives and performance targets in the RFP, it is our recommendation to leverage the Salesforce platform.

- The Salesforce Platform includes all needed infrastructure, which is fully hosted, managed and maintained by Salesforce.

- Salesforce Force.com is a modern Platform as a Service (PaaS) that's built for cloud computing, with multitenancy inherent in its design. To meet the high demands of its large user population, Force.com's foundation is a metadata-driven software architecture that enables multi-tenant applications.

Source: Salesforce

4.2 – RFP Approach

Over the course of this RFP process – Slalom performed the following activities to assess the Salesforce platform against the State Bar AIMS capabilities to determine if platform could meet needs as defined in RFP. This assessment will continue throughout design to identify and highlight gaps and customizations required to meet your requirements.

1 Identify required AIMS capabilities from RFP

2 Identify required data model & integrations

3 Assess SFDC Platform Fit / Gap against capabilities

4 Evaluate customizations required

5 Align with Salesforce on proposed solution & licensing needs

In addition to these activities – Slalom considered the following items when reviewing the Salesforce platform -

- Breadth of functionality out of the box
- Ability to support required data model
- Flexibility of the platform
- Stability of the vendor
- R&D budget for the platform
- Our experience building enterprise solutions on the platform
- Ability to support current and future integration needs / complexity
- Ability to support mobile and community requirements

4.2 – Salesforce – Platform Capability Fit

Based on review of State Bar's required capabilities, data model and integrations – the Salesforce platform will provide a best-in-breed solution that aligns with our methodology of "configuration-first".

Salesforce Service Cloud:

- Is THE **best-in-breed solution** for Service capabilities
- Provides State Bar with **simple and easily configurable solution** to support Case Management process
- Allows for **quick escalations** – including required email capabilities
- **Demo**: Salesforce Service Cloud Demo

Salesforce High Education (HEDA):

- AppExchange solution to support required education & training data model
- Simple solution that is easily configurable
- Provides strong foundation for core functionality

Salesforce Community Cloud:

- Provides **self-registration** capabilities
- Enables collaborations & sharing of information both internal and external
- **Demo**: Salesforce Community Cloud Demo

Salesforce Customizations:

- Leverage custom objects and Visualforce to support Question submission and performance test creation
- Custom objects are easily added and administered

4.2 – Salesforce – Proposed Data Model

The following diagram illustrates the proposed State Bar future state entity relationship diagram (high level) to support AIMS functionality - mapping Salesforce platform to required data model objects; and highlighting Salesforce and App Exchange objects. During design – we will validate this proposed data model against your detailed requirements.

Leverage Salesforce HEDA AppExchange product to extend native functionality – allowing Cal Sate Bar to track and manage relationships between Students, schools and mentors.

Leverage Salesforce Service Cloud to support Case Management needs

AppExchange solutions will also be evaluated for inclusion in the overall project to meet exam session tracking needs.
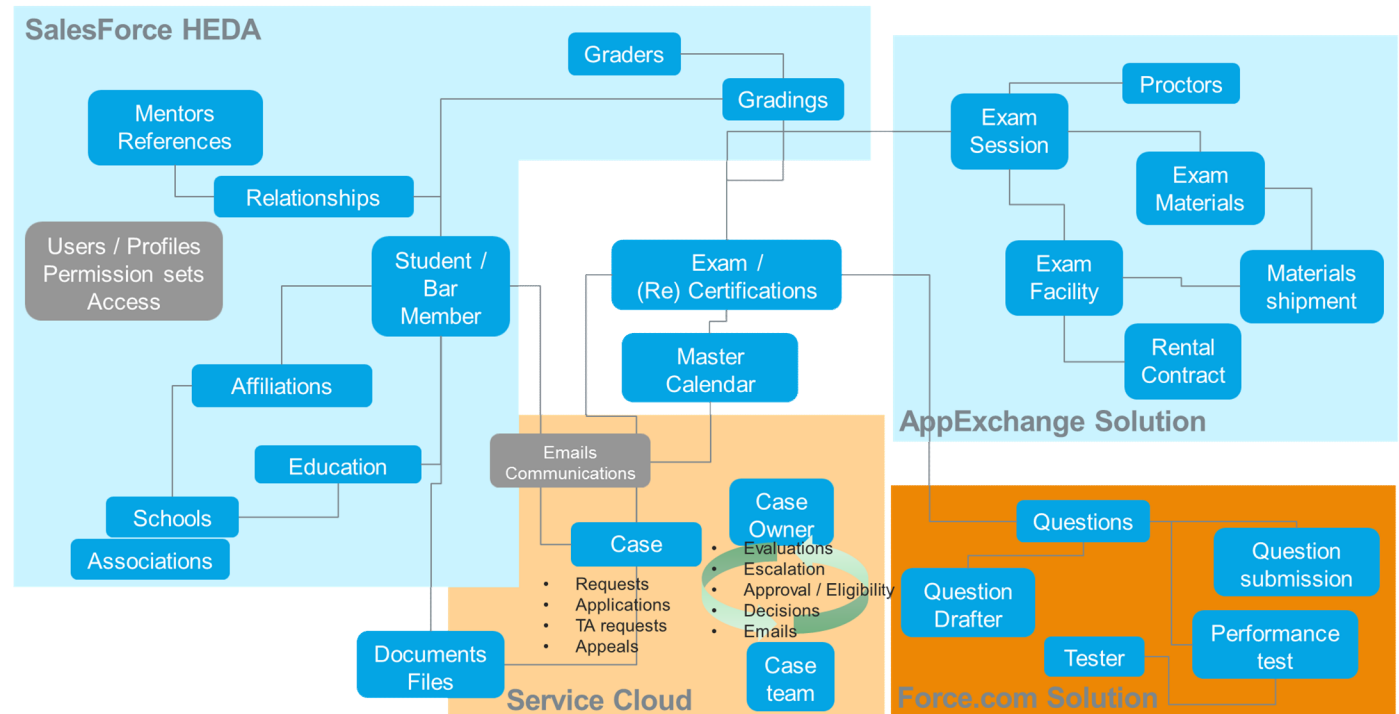
4.2 – Salesforce – Integrations Requested

The following table details the integration points identified in the RFP to interface with the Salesforce platform. Integration approach and scope, timing & priorities will be confirmed during project design.

System	Direction	Type of integration	TOC	Notes
DOJ	Incoming	File received with live scan results	16.3	An electronic file is received from the DOJ with Live Scan results (FBI and fingerprint report). That file is sent to a secure server which updates the AS400. The file contains applicants' names, tracking numbers, Social Security Number, result ("rap sheet"), and result date. The DOJ file also shows FBI results. Only one person has access to the DOJ.
DMV	Incoming	File received	16.3	The DMV file is used to cross-check the driving record uploaded on the electronic application. The upload of DMV information to AIMS will be automated.
DSS / SLMS	Incoming	File received	16.3	Information from the DSS file is the source for the exception report that will show applicants who owe child support.
Schools	Incoming	File received	16.3	Records / Transcripts: used to certify education. Certifying education is part of the registration and exam eligibility processes. There are also other hard copy forms sent from schools to Educational Standards to comply with rules. Schools may send transcripts and certifications electronically (pending management's decision.)
MBE	Incoming	File received	16.3	MBE Scores from NCBE: The data file received from the MBE is used to calculate grades for the Bar exam.
Scantrons	Incoming	File received	16.3	Scantrons are used for Moral Character and Legal Specialization references to submit responses to the questionnaire.
Secure PDFs	Outgoing	Email sent w/ attachments	16.3	Emails with secure PDFs are sent to consultants for TA recommendations.
Visual Client bulk scanner / Barcode (Color Bar label)	Incoming	Scanned documents into Doc Mgmt System	19.1	Visual Client is a tool used to scan files (application, law school declaration, references) so they can be viewed electronically. Utilizing a bulk scanner, the Moral Character Application and related documents received with the application are scanned into Visual Client, then forwarded to the file room. The first page of the applicant's Moral Character Application bearing a bar code is printed from Visual Client and placed on top of the documents relating to the applicant's Moral Character file.
Online Payment system	Bidirectional, real-time	Registration / Applications for exams/certifs.	2.1	Fees paid will be submitted to an ADM processing queue for review and approval. Some withdrawals are entitled to refunds, and the amount depends on when the withdrawal happened. AIMS should be able to calculate how much of the fee the applicant is entitled to be refunded. The application will need to recognize the difference in fees based on method of exam.
AppleOne agency	Bidirectional	TBD, many approaches possible	6.4	Communication between Applicant Services & Exam Staffing and AppleOne Agency (contracting agency for proctors). Current system is not automated, but some items are not working. A lot of matching is done manually.
ExamSoft	Bidirectional	TBD, many approaches possible	7.2	For grader assignment tracking and scheduling
California Franchise Tax	Incoming	TBD, many approaches possible	9.2	(Moral Character) California Franchise Tax will be checked through an AIMS module.
Lyris	Incoming	TBD, many approaches possible	9.2	Consideration needs to be given to how AIMS must interface with Lyris to maintain the email list.

4.2 – Salesforce – Platform Capability Fit

The AIMS Suite of processes and functions will be implemented using the Salesforce Service Cloud for Case Management, Salesforce Community Cloud, Salesforce HEDA, configurations & automations, as well as installation & configuration of AppExchange applications as detailed against the diagram below.

- Service Cloud / Case Management

- Salesforce Communities

- Salesforce HEDA (Higher Education Architecture) App Exchange

- Additional AppExchange Solutions
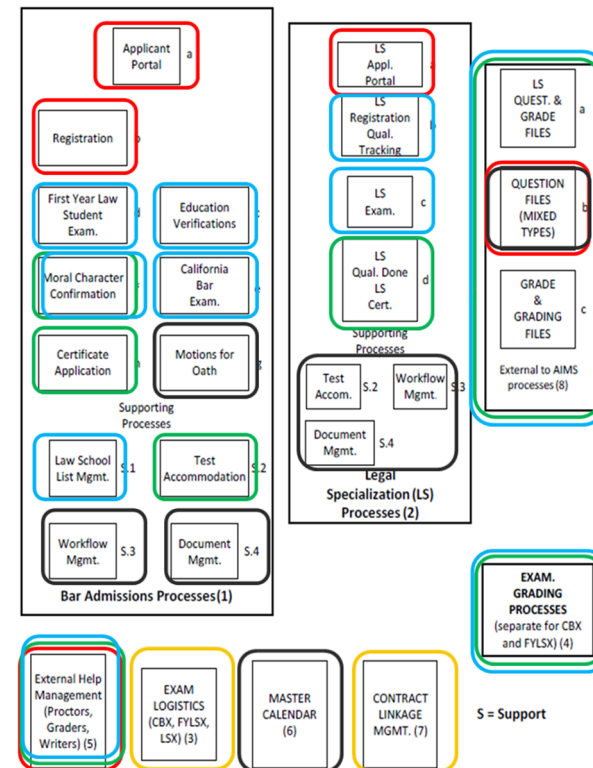
4.3 – Salesforce Network Access Requirements

Salesforce only requires a computer that can run a web browser and an Internet connection or a mobile device. No other software or hardware is required. Salesforce applications are delivered on-demand over the Internet, so the State Bar will not need to worry about licensing software or setting up and managing hardware platforms.

Salesforce is a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the State Bar to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browsers are available, including mobile devices. Salesforce's internet accessible servers reside behind a perimeter router, external firewall and IDS. A logical network diagram can be shared under a NDA.

Additional information on network access and bandwidth requirements can be found at:
https://help.salesforce.com/articleView?id=000004958&type=1

Salesforce supported browsers can be found at:
https://help.salesforce.com/articleView?id=getstart_browser_overview.htm&type=0&language=en_US&release=206.18

Salesforce supported browsers for communities can be found at:
https://help.salesforce.com/articleView?id=networks_communities_browser_support.htm&type=0&language=en_US&release=206.18

Source: Salesforce

4.4 – Salesforce Product Lifecycle Plan

Salesforce has been providing its customers with three major release upgrades each year since the company's inception over 18 years ago. Salesforce's research and development efforts are focused on improving and enhancing the features, functionality, and security of the existing service offerings as well as developing new proprietary services. In addition, from time to time Salesforce supplements its internal research and development activities with outside development resources and acquired technology.

- The State Bar will receive (3) three free, seamless and automatic major release upgrades per year (450+ new features each year) as part of the subscription service, and with no impact to the State Bar's solution implementation, including workflow, integrations, reporting or customizations.
- All upgrades, patches, and other system maintenance are provided as part of the subscription service at no additional cost to the State Bar.
- Each release comes with a set of Release Notes, which highlight new features and functionality. Current and past release notes can be found here: http://releasenotes.docs.salesforce.com/

Salesforce releases three complimentary upgrades each year, in Winter, Spring, and Summer versions. All Salesforce users are always on the latest version of our platform because everyone gets instant upgrades (typically on an opt-in basis). Each time Salesforce releases a new version of the application and the platform, the entire community can take advantage of the latest innovations from our product development team. Because of our multi-tenant architecture, Salesforce is able to provide all of our customers with a service based on a single version of our application. We are able to upgrade all of our customers at the same time with each release. Each release will be delivered automatically in a transparent manner, and will not break the State Bar's configurations.

Source: Salesforce

[X]
CLOSING THOUGHTS

Why Slalom

We are uniquely qualified to successfully deliver this project for California State Bar. Slalom believes in building teams that are "right sized" and focused on getting to desired outcomes. We pride ourselves in differentiating through collaboration and always striving to make our clients successful

1 **We are Locally focused**

We are fortunate to live and work right where you do. We go to the same schools, sporting events, and share the same good Southern California living.

2 **We focus first on our clients**

Being locally focused means we partner differently with our clients as we all are in the same community. This makes us constantly aware of how we are delivering to meet & exceed your expectation

3 **We provide strategic thinking**

We are thought leaders first and will bring examples of how we might think differently together.

4 **We know SALESFORCE**

We are one of Salesforce's most strategic partners as the 6th largest partner in the world and have over 800 consultants on 3 continents

5 **We know your Community**

We have a dedicated Public Sector Practice and have experience in building communities and engagement in your industry

6 **We've been here BEFORE**

We have relevant experience in this type of application and can demonstrate this knowledge now and through the end of this project.

Contact Us

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[X]
APPENDIX

Appendix – Team Profiles – Carrie McWilliams

Carrie McWilliams
Practice Area Lead

Carrie has more than 12 years of professional experience, including 10 years in Marketing, Sales & Customer Service strategy and implementations. Carrie specializes in business development, IT strategy and client advisory services managing large-scale technology implementations and customer transformation efforts.

Carrie has worked across industries – including consumer goods, hi-tech, media & entertainment and healthcare. She is passionate about technology and is focused on leadership, and collaboration to achieve business value and success. She is a subject matter expert in customer experience management and customer relationship management. Carrie is a leader in Slalom's LA Customer Engagement Practice.

SAMPLE PROJECTS

Marketing Campaign Management Implementation – Project Lead

Responsibilities included: Evaluated possible vendor solutions; identified business critical campaigns and developed outbound campaign strategy to drive registration in support of product launches; designed and implemented salesforce automation and campaign management solutions to support campaign planning and execution; integrated campaign management solution to Marketing Analytics warehouse and branded websites

Customer Experience Strategy and Implementation – Project Lead

Responsibilities included: Developed future state customer experience strategy to support multi-tiered, multi-channel marketing, sales, service and support ramp up to the Affordable Care Act (ACA); conducted workshops and design sessions to design and implement seamless customer experience from marketing through enrollment across all contact channels - improving lead conversion for licensed agents, reducing handle time and abandon rates

HIGHLIGHTS
- Consulting leader with more than 12 years of professional experience
- SME in customer experience management, customer transformation and customer relationship management
- Experience across consumer goods, hi-tech, media, entertainment, and healthcare
- Recent relevant project experience includes: Marketing Campaign Management implementation and Customer Experience Strategy implementation

EXPERTISE
- Digital Strategy / Transformation
- Technology Strategy / Transformation
- Marketing Automation
- Vendor Landscaping & Selection
- Process Optimization
- Solution Delivery
- Social Media & Digital Engagement
- Technology Roadmaps
- Customer Relationship Management (CRM)

CERTIFICATIONS
- Salesforce Admin
- Salesforce Sales Cloud
- Salesforce Service Cloud
- Big Machines Blue Belt

Appendix – Team Profiles – Joe Frank

Joseph Frank
Solution Principal

Joseph has more than 12 years of professional experience in Marketing, Sales, Operations & Customer Service strategy and implementations. Joseph specializes in IT strategy and client advisory services managing large-scale technology implementations and customer transformation efforts.

Over the last the last 12 years, Joseph has had a wide range of experience in the technology industry, including project management, re-engineering and optimizing sales, operations, marketing and support organizations and processes, designing business applications and user experiences, data analytics, business and developer relations, product management, and operations.

SAMPLE PROJECTS

Customer Acquisition Implementation – Product Manager - YP

Redesigned and implemented the end-to-end experience for lead and pipeline management for over 5,000 users using Salesforce, Eloqua, Ingenius, and Invoca; UI design; evaluated vendor solutions; managed multiple development teams; creating and executing roadmaps; standardized lead and sales processes for multiple channels; enabled real-time reporting; connected web traffic, campaign and sales data in a data warehouse for end-to-end reporting.

Sales Pipeline and Service Implementation – Technical Lead - Capital Group

Deployed Salesforce to the marketing, operations, and client service groups; strengthened inter-departmental connections to maximize business solutions for portfolio analysis, sales, and customer service. Designed and executed the product roadmap for the Private Client Services business unit. Delivered tools that addressed key regulatory issues while enabling the group to provide more consistent investment strategies for all customers.

HIGHLIGHTS
- 12 years of experience of designing, implementing, and managing applications as the client and consultant
- Hands-on experience in sales, marketing, and service automation, customer transformation and customer relationship management
- Experience in hi-tech, media, and finance

EXPERTISE
- Technology Strategy
- Marketing & Sales Automation
- Customer Acquisitions
- Case Management
- Data Management/Strategy
- Project Management
- Product Management
- Process Building/Optimization
- Customer Relationship Management (CRM)
- Roadmaps
- Agile Product Development
- System Integrations
- Back-office Operations

CERTIFICATIONS
- Salesforce Administrator
- Salesforce Advanced Administrator

Appendix – Team Profiles – Fabien Diakhate

Fabien Diakhate
Solution Architect

Fabien brings 10+ years' experience in CRM implementations, from global multinational companies in the Americas and Europe to small/medium companies, across multiple industries. His expertise encompasses requirements gathering, business analysis, functional design, process re-engineering, user acceptance testing, and training delivery. By ensuring key stakeholders ownership and streamlining processes across teams and departments, Fabien designs and delivers solutions that improve Key Performance Indicators and ensure high end user adoption.

SAMPLE PROJECTS

Solution Architect – High-Tech Company, Partners & Customer Community Cloud, Service Cloud, Field Service Lightning. Templates used: Salesforce tabs & VisualForce template for the partner community, Napili Template for the customer community. Scope included Cases creation, status check, Knowledge management (articles, topics, etc.), Work Orders status check. Dell Boomi integration of SAP Notifications (Cases).

Team Lead / Architect – Global HCM Solutions Provider, Partners Community Cloud, Service Cloud, Knowledge Management. designed 2 critical complex enhancements / custom apps: Requirements gathering / solution design / functional specification / testing / go-live and support. Provided architecture/data migration recommendations & strategy. Designed governance for data management, security & user management.

Solution Architect – Higher Education Institution, Service Cloud, Sales Cloud. Salesforce Higher Education Data Architecture. Custom data model to support internships / Job Opportunities management & Career center processes. High-Touch Support Call Center. Complex Data Migration (High volume, related objects and multiple rules). Process automation with Apex Triggers, Lightning Process Builder & Workflows.

HIGHLIGHTS
- Certified CRM expert
- 10+ years experience with expertise across High-Tech, Retail, Medical Devices, Manufacturing and higher education / non profit organizations.

EXPERTISE
- Salesforce Community Cloud: Customer Self-Service, Partner Community
- Salesforce Service Cloud: Call Centers, Case to Work Order lifecycle, Skills/Queuing, Service Contracts/Entitlement, Live Agent, Knowledge Management, Assets Management
- Salesforce Sales Cloud: Territory Management, Lead and Opportunity Management
- Process Automation: Lightning Process Builder, Triggers, Workflows
- Business Process Optimization
- Data Migration
- User Acceptance Testing / Training Development and Delivery

CERTIFICATIONS
- Salesforce Community Cloud Consultant
- Salesforce Platform App Builder
- Salesforce Sales Cloud Consultant
- Salesforce Service Cloud Consultant
- Salesforce Advanced Administrator
- Salesforce Administrator
- Salesforce Field Service Lightning
- Salesforce Development Lifecycle & Deployment Design
- SAP CRM

Appendix – Team Profiles – Kris Woods

Kris Woods
Solution Integration, UI/UX

Kris is an IT Professional with over 7 years of experience encompassing Web & Mobile Development, Cloud Integrations and Consulting Services. He has specialized on the Microsoft technology stack for the Enterprise encompassing everything from installation & configuration and development. Kris is recognized for his excellent communication and problem solving skills, broad technological insight and commitment to helping clients achieve success.

SAMPLE PROJECTS

Senior Developer – Consumer Goods Company,

Responsibilities included: implementation of enterprise-wide intranet with responsive design for phone, tablet and desktop

Senior Developer/Architect – Real Estate Company,

Responsibilities included: design & implementation of a web-based contract request, creation & management system integrated with SharePoint and Docusign for required approvals

Senior Developer/Analyst – Biotechnology Company,

Responsibilities included: design of collaboration sites, portals, and workflows in Office365, end-user training, improving the support and adoption of internal collaboration tools to help business clients fully realize the value of the platforms, and defining a stand-alone service offering to provide ongoing development & support

HIGHLIGHTS
- Certified Professional Developer
- 7 years experience with expertise across biotech, e-commerce, healthcare and real estate

AREAS OF EXPERTISE
- Mobile/Web UI
- Integrations
- User Experience
- Enterprise Web

CERTIFICATIONS
- Xamarin Certified Mobile Developer
- Sitecore Certified Professional Developer
- MCTS Web Application Development
- Salesforce Admin

Appendix – Team Profiles – Tiffany Chen

Tiffany Chen
Consultant

Tiffany brings over 6 years of experience in Salesforce.com CRM with expertise in requirements gathering, business analysis, functional design, process re-engineering, user acceptance testing, and training delivery. Through her experience implementing end-to-end Salesforce.com Sales Cloud and Service Cloud solutions, Tiffany is well recognized for her proven analytical and problem solving skills, along with her excellent customer focus and business acumen, leveraging Salesforce.com platform to empower her clients to collaborate, innovate, and achieve success.

SAMPLE PROJECTS

Functional Consultant – Global Food & Beverage Company, implementation of Salesforce for nation-wide network upgrade and conversion initiative across 7000+ stores, including the development of web services APIs.

Sr. Business Analyst – Global Satellite and Digital Communications, replacement of the existing service desk ticketing system with a scalable enterprise-level Salesforce Service Cloud solution for 200+ IT service agents, responsible for architecting and building Salesforce.com platform, solution deployment, user acceptance testing, and user training delivery.

Salesforce Configuration Specialist – Digital Media Agency, implementation of Salesforce Sales Cloud solution for content sales, ad sales, and event sales. Enhancement of Salesforce Case Management and Customer Portal to improve the customer experience for over 280 distributors with thousands of retail locations.

HIGHLIGHTS
- Certified CRM expert
- 6 years experience with expertise across health series, communications, e-commerce, business services and digital media

EXPERTISE
- Salesforce Service Cloud: Case Management, Entitlements, Knowledge Management
- Salesforce Sales Cloud: Collaborative Forecast, Analytics Snapshot, Lead and Opportunity Management, Visual Workflow and Process Builder
- Business Process Optimization
- Data Migration
- UAT, Training Development and Delivery

CERTIFICATIONS
- Salesfore.com Marketing Cloud E-mail Specialist
- Salesforce Certified Platform Developer I
- Salesforce Certified Advanced Administrator
- Salesforce Platform App Builder
- Salesfore.com Sales Cloud Consultant
- Salesforce.com Service Cloud Consultant
- Salesforce.com Administrator
- Certified ScrumMaster (CSM)

Appendix – Team Profiles – Stacy Scherer

Stacy Scherer
Consultant

Stacy has more than seven years consulting experience as a business systems analyst and project manager. Enterprise projects and roles include SCRUMMASTER, project manager, business analyst and functional consultant on multiple complex CRM system implementations and custom development projects. Industries include marketing, entertainment, real estate, automotive, and retail. Stacy graduated from Michigan State University with a degree in Supply Chain Management. She is also a certified Agile Scrum Master (CSM).

SAMPLE PROJECTS

Entertainment Implementation and Customization – Lead Consultant

Responsibilities included: Designed and built customizations for lead and customer management, as well as, system redesign for online platforms: Led requirements gathering, high-level use cases, wireframe creation, support collaboration tools, enhanced existing system for improved user experience through work flows, dashboards, reporting, and email marketing management, created training materials and led training initiatives.

Property Management Implementation and Customization – Lead Consultant

Responsibilities included: Managed the leasing automation feature involving process automation, document generation and management, e-signature, coordinated project resources and third-party vendors, customized CRM system and developed testing and training documentation.

HIGHLIGHTS
- Implementation analyst with over 7 years experience
- Certified Agile Scrum Master (CSM) for over 4 years
- Experience across entertainment, hospitality, automotive, real estate and consumer goods industries
- Recent project highlights: Led redesign and strategy of various online platforms and managed large custom development project with CRM integrations and mobile components

EXPERTISE
- SCRUM
- Project Management
- Agile Project Management Tools
- Process Improvement
- Training Development and Delivery
- Process Building/Optimization
- Customer Relationship Management (CRM)
- Solution Delivery
- Customer Experience

Appendix – Team Profiles – Andy Whitehouse

Andy Whitehouse
Consultant

Andy is a skilled consultant with 5+ years experience in technology and a background in agile scrum methodology. A PMP certified leader and Solution Owner with a track record of success in planning and executing a variety of initiatives. She has worked with all organizational levels from executive management to line-level by functioning as the liaison between user and technical groups.

SAMPLE PROJECTS

Salesforce Implementation – Strategic Service CRM Business Analyst / Quality Assurance

Current state business process analysis and future state requirements gathering for insourcing Employer Outreach program and integrating Salesforce with external applications. Captured user stories, data mapping, testing, and training. Responsible for overall quality of solution performance; including generating and executing test scripts.

Custom Development – Student Information Systems Business Analyst / Scrum Master

Led a full software development lifecycle of a Student Information System enabling admissions and records, curriculum administration, students, and faculty business processes. Facilitated scrum ceremonies, user acceptance testing, and other agile project-related meetings. This multi-cultural project environment included over 20 fulltime individuals at its peak.

HIGHLIGHTS
Andy has contributed to the success of various projects, ensured successful design, implementation, and acceptance of new applications and technologies. She enjoys learning about people, processes, and systems to identify improvement opportunities and help businesses reach their vision with effective solutions and strategies.

EXPERTISE
- Agile scrum project management
- Software development lifecycle
- Solution Owner
- Project planning
- Requirements analysis & evaluation
- Business systems analysis
- User experience

CERTIFICATIONS
- Project Management Professional
- Salesforce Certified Administrator
- Salesforce Certified Developer
- Salesforce Sales Cloud
- Salesforce Service Cloud

Aron Kale
Consultant – Organizational Effectiveness

Aron is a dedicated consultant who specializes in guiding clients through major technology, organizational, and process changes. Aron has a genuine passion for finding creative solutions to complex problems and has been recognized for his ability to delight customers while driving projects to success.

RELEVANT EXPERIENCE

- **International Non-Profit Organization (San Francisco, CA)** Change Management Lead
  Developed and executed end-to-end change management plan to support implementation of Salesforce.com to track all fundraising and giving activity. Conducted workshops to identify project vision, define success metrics, analyze stakeholder groups, and assess change readiness. Created a change management strategy and delivered tailored communications and training materials in line with that strategy. Developed detailed stakeholder engagement program and teamed with client stakeholders to implement program.

- **International Software Organization (Los Angeles, CA)** Change Management Lead
  Developed and executed training plan to support implementation of a global customer support system and associated process changes. Conducted impact analysis to identify training needs and skill gaps by stakeholder group and location. Created customized training content to support rollout of customer support system and process changes in each region. Developed job aids to help managers support their teams during transition. Facilitated training sessions in France, Italy, and USA.

- **Media and Entertainment Studio – Distribution Operations (Los Angeles, CA)** Process Analysis Lead
  Developed recommendations to improve the process of distributing content to broadcast/cable clients. Conducted discovery workshops and documented current state processes, tools, and pain points. Identified opportunities for improvement, prioritized needs, and built consensus around desired future state approach. Provided recommendations and next steps to implement process changes.

- **Financial Services Organization (San Diego, CA)** Project Manager / Business Analyst
  Managed the implementation of a cloud-based feedback management system for assessing the satisfaction levels and needs of broker-dealers. Developed project vision, success metrics, and documented requirements. Partnered with client team to develop a survey for gathering customer feedback, determine sampling strategy, design process for taking action on feedback, and create system reporting interface for analyzing results. Managed configuration, testing, and launch of system.

HIGHLIGHTS

Consultant, Organizational Effectiveness – Slalom Consulting. Los Angeles, CA. March 2017 – Present

Senior Consultant – OnPrem Solution Partners. Los Angeles, CA. April 2016 – March 2017

Change Enablement Consultant – Appirio. Indianapolis, IN. June 2013 – April 2016

EXPERTISE

Change Management

Business Analysis

Process Analysis and Optimization

Requirements Gathering

Stakeholder Analysis and Engagement

Training and Communications Strategy

End-to-End User Adoption

Enterprise Social and Collaboration

Performance Management

Project and Program Management

Agile Development

Attachment A: Itemized Cost Proposal

Vendor Name: **Slalom / Salesforce**

SOLUTION TYPE

Hosted

One-Time Costs

Initial costs associated with the configuration, installation and implementation of the proposed Trial/Court/Probation Case management system.

ITEMIZED COST

ITEMIZED COST

1 Software license/subscription: *Itemize all one-time costs associated with acquiring a license or subscription for the proposed system (short description below w/NTE cost to right).*

Description	Cost
Service Cloud - 1 year subscription - Internal Users	$ 97,020.00
Communities Logins - 1 year subscription - external logins	$ 40,800.00
Government Cloud - 1 year subscription - FedRamp Approved	$ 48,237.00

6 Process Improvement: *Identify all one-time costs associated with professional services for process improvement.*

Description	Cost
Solution architect	$ 350,550.00

2 Third-Party Infrastructure Licenses: *Itemize all costs associated with underlying software needed to run the proposed application (such as database mgt system, operating system, etc.)*

Description	Cost
NA (cloud solution)	

7 Software Configuration: *Itemize all one-time costs for configuration of the proposed software to meet our needs as defined in this RFP.*

Description	Cost
Developers	$ 639,900.00
Configuration analysts	$ 416,250.00

3 Other Third-Party Licenses: *Itemize all one-time costs associated with report writers, statistical packages or other tools required to fully utilize the proposed application software.*

Description	Cost
To be defined depeding on which applications are used from AppExchange	$ -

8 Training: *Itemize one-time costs associated with each proposed training class (assume instructor for full-day classes--LA office, 12 students/class, including travel expense.*

Description	Cost
Change Management / training	$ 236,430.00

4 Project Management: *Itemize all one-time costs associated with implementation project management services.*

Description	Cost
Project Manager during project	$ 384,750.00
Engagement leader	$ 241,680.00

9 Implementation Expenses: *Itemize all one-time out-of-pocket expenses associated with providing the proposed products & services (e.g., per diem, travel, hotel, meals, copying, telephone).*

Description	Cost
Resources will be local for most of project duration, will leverage delivery center for development	$ 123,000.00

5 Installation: *Itemize all initial proposed system costs, by software product or expense category (e.g., sales tax, installation, check-out).*

Description	Cost
NA (cloud solution)	

10 Other: *Itemize all other one-time costs associated with the proposed system. If local server install solution, summarize server hardware cost.*

Description	Cost
NA	

	Original
primary license	$ 186,057.00
third-party licenses	$ -
implementation	$ 2,033,130.00

	Original
training	$ 236,430.00
travel expense	$ 123,000.00
other	$ -

Attachment A: Itemized Cost Proposal

Vendor Name:	**Slalom / Salesforce**

Solution Type: **Hosted**

Annual Costs

Recurring costs associated with support and maintenance of the proposed system.

	Initial Term			Renewal Option	
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**

1 **Recurring Software Support**: *Itemize all costs for the proposed application software.*

Itemized Cost

	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Subscription Costs - 7 % uplift yearly - assuming one year contract and renewing after (Includes all line items)	*186057*	$ 199,080.99	$ 213,016.65	$ 227,927.82	$ 243,882.77
	included in initial license				

2 **Recurring Electronic Support**: *Itemize all ongoing cost (e.g., Internet news groups, instant messaging, support webs sites, e-mail).*

Itemized Cost

	Year 1	Year 2	Year 3	Year 4	Year 5
Support is factored in with Gov Cloud line item.	*included in initial license*	$ -	$ -	$ -	$ -

3 **Recurring Third-Party Software Support:** *Itemize all ongoing costs required to fully utilize the proposed system (e.g., report writer, statistical package, other tools).*

Itemized Cost

	Year 1	Year 2	Year 3	Year 4	Year 5
To be defined / Depends on applications used from AppExchange	*included in initial license*				
	included in initial license				
	included in initial license				

4 **Other**: *Itemize all other ongoing costs not itemized above.*

Itemized Cost

	Year 1	Year 2	Year 3	Year 4	Year 5
NA	*included in initial license*				
	included in initial license				
	included in initial license				

	SUBTOTALS				
	$ 199,080.99	$ 213,016.65	$ 227,927.82	$ 243,882.77

Attachment A: Itemized Cost Proposal

Vendor Name: **Slalom / Salesforce**

Additional Consulting

Additional consulting services as needed and not included in initial implementation and/or annual recurring maintenance above.

Solution Type: **Hosted**

Position Classification Group	Project Manager	Sr Application Consultant	Application Consultant	Other (specify)	Other (specify)
Classification Title Bid *(your equivalent, if different from above)*	Project Manager	Solutin Architect	Configuration Consultant	Developer	Change Management Expert
Home Office *(location: city, ST)*	Los Angeles, CA	Los Angeles, CA	Los Angeles, CA	Los Angeles, CA	Los Angeles, CA
Hourly Bill Rate	$ 225.00	$ 205.00	$ 195.00	$ 185.00	$ 185.00

Projected Project Costs

Summary does not include optional components

	Initial Term			Renewal Option	
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Primary (core) software licensing	$ 186,057				
Third-party software licensing	$ -				
Initial implementation	$ 2,033,130				
Initial training	$ 236,430				
Estimated travel Expense	$ 123,000				
Other One-time (includes hardware for local install)	$ -				
Recurring software maintenance		$ 199,081	$ 213,017	$ 227,928	$ 243,883
Additional consulting blended rate: 80 hrs per yr (included for cost scoring only--actual unknown)		$ 15,920	$ 15,920	$ 15,920	$ 15,920
Annual Estimates	$ 2,578,617	$ 215,001	$ 228,937	$ 243,848	$ 259,803

TOTAL PROJECTED COST: $ 3,526,205

Disclaimer: Salesforce is an innovative cloud services provider with constantly evolving technology. We have made a good faith effort to provide you with responses to your request that are accurate as of the date of the response and within our knowledge. Because Salesforce procedures and policies change from time to time and Salesforce continues to innovate by providing each customer multiple major release upgrades each year, we cannot guarantee that the answers to your request will remain the same over time. The rights and responsibilities of the parties with regard to use of Salesforce's online software services shall be set forth solely in the applicable agreement executed by Salesforce. The responses here to your request shall not be part of a final contract.

Attachment B: Vendor History Questionnaire

Enter relevant information in all yellow cells below, choosing from menu as applicable. Enter n/a if not applicable to your organization.

Business Details	Complete fields below		
Legal Name of Business or Full Name of Individual	Salesforce, Inc.		
Name of Ultimate Holding Entity *if applicable*	N/A		
Registered Business or Trading Name *if applicable*	N/A		
Registered Business Address--Street	The Landmark @ One Market, Suite 300		
Registered Business Address--City, ST Zip	San Francisco, California 94105		
Business URL	www.salesforce.com		
Business Type	Corporation	State of Registration / Incorporatic	Delware
Taxpayer Identification Number *TIN or SSN*	Federal Tax ID: 94-3320693	Number of Years in Business	18
Publicly traded?	yes	Trading Symbol	CRM
Number of Full-Time Employees	25,178	Part-Time Employees	N/A
Former Business Name *if applicable*	N/A		
RFP Point of Contact Name / Title	Alexander Acree, Enterprise Commercial Sales Account Executive (Public Sect		
RFP Point of Contact Email Address	aacree@salesforce.com		
Subcontractor Use: Vendor is solely responsible for all deliverables?	Vendor & Subcontractors jointly responsible (attach 1 for each sub)		
Financial Details	*Summarize financials below. Enter n/a or zero as applicable.*		
	2015	**2016**	
Revenue/Sales	Detailed financial statements are available via our website: http://investor.salesforce.com/about-us/investor/financials/default.aspx	Detailed financial statements are available via our website: http://investor.salesforce.com/about-us/investor/financials/default.aspx	*als. Leave no blanks.*

Cash	Please refer to our response above.	Please refer to our response above.	*Enter numerical amounts only, no symbols/decim*
Accounts Receivable	Please refer to our response above.	Please refer to our response above.	
Short Term Investment	Please refer to our response above.	Please refer to our response above.	
Current Assets	Please refer to our response above.	Please refer to our response above.	
Total Assets	Please refer to our response above.	Please refer to our response above.	
Current Liabilities	Please refer to our response above.	Please refer to our response above.	
Total Liabilities	Please refer to our response above.	Please refer to our response above.	
Cash From Operations	Please refer to our response above.	Please refer to our response above.	
Current D&B Rating	Salesforce's D&B Rating: 5A2	Audited Financials Included?	yes
Explanation for Any Missing Financial Information Above:	N/A		

Conflict of Interest
Attach detailed explanation for any item(s) marked yes.

Are there any known business or financial relationships between your firm and members of the State Bar's Trustees?	Current Board of Trustees Roster		no
	EMPLOYEE NAME	**DEPT / ROLE**	**Y / N**
Are there any known business or financial relationships between your firm and the following State Bar staff:	Gayle Murphy	Office of Admissions	no
	Resty Buenavidez	Office of Information Technology	no
	Lisa Cummins	Office of Admissions	no
	Natalie Leonard	Office of Admissions	no
	Greg Shinn	Office of Admissions	no
	Murat Avsar	Office of Information Technology	no

Principal Officers / Account Management
Attach detailed explanation for any item(s) marked yes.

Principal 1 Name / Title	Marc Benioff	Chairman & CEO

Principal 1 Primary Office Address / Direct Email Address	The Landmark @ One Market, Suite 300 San Francisco, California 94105	info@salesforce.com
Principal 2 Name / Title	Parker Harris	Co-Founder
Principal 2 Primary Office Address / Direct Email Address	The Landmark @ One Market, Suite 300 San Francisco, California 94105	info@salesforce.com
Principal 3 Name / Title	Keith Block	Vice Chariman, President and COO
Principal 3 Primary Office Address / Direct Email Address	The Landmark @ One Market, Suite 300 San Francisco, California 94105	info@salesforce.com
Account Manager name, phone	Alexander Acree	Commercial Sales Account Executive (Public Sector)
Account Manager primary office address, direct e-mail address	2550 Wasser Terrace, Suite 100 Herndon, VA 20171	aacree@salesforce.com
Supplementary Information	*Explain any item(s) marked yes below.*	
Has any current office bearer above been involved with a business failure?		Salesforce legal proceedings are included in our annual report (10K), which may be found on our website: http://www.salesforce.com/company/investor/
Has any current office bearer declared bankruptcy?		
Has any current office bearer been involved in a government investigation?		
Is there any current, pending, or finalized litigation against your organization during the past 5 years?		
Any debt collections by debt collection agency on behalf of creditors of your organization or current office bearers?		
Are there any other contingent liabilities not reported in the financial statements, that are likely to impact your financial position?		

Attachment B: Vendor History Questionnaire

Enter relevant information in all yellow cells below, choosing from menu as applicable. Enter n/a if not applicable to your organization.

Business Details — *Complete fields below*

Legal Name of Business or Full Name of Individual	Slalom, LLC
Name of Ultimate Holding Entity *if applicable*	n/a
Registered Business or Trading Name *if applicable*	Slalom, LLC
Registered Business Address--Street	821 2nd Avenue, Suite 1900
Registered Business Address--City, ST Zip	Seattle, WA 98104
Business URL	www.slalom.com

Business Type	Other	State of Registration / Incorporation	n/a
Taxpayer Identification Number *TIN or SSN*	84-1246887	Number of Years in Business	23+
Publicly traded?	No	Trading Symbol	n/a
Number of Full-Time Employees	4250	Part-Time Employees	<25
Former Business Name *if applicable*	Accounting Quest		
RFP Point of Contact Name / Title	Carrie McWilliams		
RFP Point of Contact Email Address	carrie.mcwilliams@slalom.com		
Subcontractor Use: Vendor is solely responsible for all deliverables?	Vendor above solely responsible for all requirements & deliverables		

Financial Details — *Summarize financials below. Enter n/a or zero as applicable.*

Enter numerical amounts only, no symbols/decimals. Leave no blanks.

	2015	2016
Revenue/Sales	Not Available - See attached.	Not Available - See attached.
Cash	Not Available - See attached.	Not Available - See attached.
Accounts Receivable	Not Available - See attached.	Not Available - See attached.
Short Term Investment	Not Available - See attached.	Not Available - See attached.
Current Assets	Not Available - See attached.	Not Available - See attached.
Total Assets	Not Available - See attached.	Not Available - See attached.
Current Liabilities	Not Available - See attached.	Not Available - See attached.
Total Liabilities	Not Available - See attached.	Not Available - See attached.
Cash From Operations	Not Available - See attached.	Not Available - See attached.

Current D&B Rating	15AA	Audited Financials Included?	no
Explanation for Any Missing Financial Information Above:	Slalom, LLC is a privately held limited liability company. Please see attached.		

Conflict of Interest — *Attach detailed explanation for any item(s) marked yes.*

Are there any known business or financial relationships between your firm and members of the State Bar's Trustees?	**Current Board of Trustees Roster**		no

	EMPLOYEE NAME	DEPT / ROLE	Y / N
Are there any known business or financial relationships between your firm and the following State Bar staff:	Gayle Murphy	Office of Admissions	no
	Resty Buenavidez	Office of Information Technology	no
	Lisa Cummins	Office of Admissions	no
	Natalie Leonard	Office of Admissions	no
	Greg Shinn	Office of Admissions	no
	Murat Avsar	Office of Information Technology	no

Principal Officers / Account Management — *Attach detailed explanation for any item(s) marked yes.*

Principal 1 Name / Title	Rick Rankin	General Manager, Management
Principal 1 Primary Office Address / Direct Email Address	8560, Sunset Bd, West Hollywood	rick.rankin@slalom.com
Principal 2 Name / Title	Ron Syn	Managing Director, Account / Industry Leadership
Principal 2 Primary Office Address / Direct Email Address	8560, Sunset Bd, West Hollywood	ron.sims@slalom.com
Principal 3 Name / Title	Kevin Burdsall	Managing Director , CRM
Principal 3 Primary Office Address / Direct Email Address	201 Spear St #1550, San Francisco	kevin.burdsall@slalom.com
Account Manager name, phone	Carrie McWilliams	Practice Area Lead Customer Engagement
Account Manager primary office address, direct e-mail address	8560, Sunset Bd, West Hollywood	carrie.mcwilliams@slalom.com

Supplementary Information — *Explain any item(s) marked yes below.*

Has any current office bearer above been involved with a business failure?	no	Slalom, LLC has had employment practices litigation in the last five years. It is now resolved and did not involve the provision of services to any of our clients.
Has any current office bearer declared bankruptcy?	no	
Has any current office bearer been involved in a government investigation?	no	
Is there any current, pending, or finalized litigation against your organization during the past 5 years?	yes	
Any debt collections by debt collection agency on behalf of creditors of your organization or current office bearers?	no	
Are there any other contingent liabilities not reported in the financial statements, that are likely to impact your financial position?	no	

Attachment C: Accessibility Standards Compliance Matrix

Vendor Name:	**Slalom / Salesforce**

In order for individuals with disabilities to have equally effective access to the products must be designed in compliance with accessible design standards. For this reason, the State Bar has chosen to require products that comply with the WCAG 2.0, Level AA accessibility guidelines, chosen because the W3C is a long-standing, international collaborative with extensive expertise in the development of design protocols for the World Wide Web. When completed, the revised Section 508 standards of the Rehabilitation Act will be primarily based upon WCAG 2.0, level AA.

Vendors interested in selling products to the State Bar must complete the checklist below, based on the WCAG 2.0 Guidelines. Please select compliance in yellow input field from menu and additional information/comments as prompted.

Content must be Perceivable, Operable, Understandable, and Robust for all users:		Level	Software Supports Guideline?	Exception Detail / Comments	Future Support	
Guidelines for "Perceivable" Content			*Perceivable* - Information and user interface components must be presentable to users in ways they can perceive, including ability to provide text alternatives for non-text content, provide captions and other alternatives for multimedia, create content that can be presented in different ways, including by assistive technologies, without losing meaning and make it easier for users to see and hear content.			
1.1.1	Text Alternatives: Provide text alternatives for any non-text content so that it can be changed into other forms people need, such as large print, braille, speech, symbols or simpler language. (Text Alternatives)	A	supports	Supports alternative text		
1.2.1	An alternative for time-based, pre-recorded audio and/or pre-recorded video is provided that presents equivalent information. (Time-based Media)	A	supports w/exceptions	Depends on the site hosting content, the media and the browser		
1.2.2	Synchronized captions are provided in pre-recorded audio, except when a text version of the media is available. (Time-based Media)	A	supports w/exceptions	Depends on the site hosting content, the media and the browser		
1.2.3	Synchronized audio descriptions or a media alternative are provided for pre-recorded, time-based video. (Time-based Media)	A	supports w/exceptions	Depends on the site hosting content, the media and the browser		
1.2.4	Synchronized captions are provided for all live audio content. (Time-based Media)	AA	supports w/exceptions	Depends on the site hosting content, the media and the browser		
1.2.5	Synchronized audio descriptions are provided for all prerecorded video (Time-based Media)	AA	supports w/exceptions	Depends on the site hosting content, the media and the browser		
1.3.1	Info and Relationships: Information, structure, and relationships that are conveyed through presentation can be interpreted by technology and communicated to different types of users, or are available in text. (Adaptable)	A	guideline not applicable			
1.3.2	Meaningful Sequence: When the sequence in which content is presented affects its meaning, a correct reading sequence can be interpreted by technology and communicated to different types of users. (Adaptable)	A	guideline not applicable			
1.3.3	Sensory Characteristics: Instructions provided for understanding and operating content do not rely solely on sensory characteristics of components such as shape, size, visual location, orientation, or sound. (Adaptable)	A	guideline not applicable			
1.4.1	Use of Color: Color is not used as the only visual means of conveying information, indicating an action, prompting a response, or distinguishing a visual element. (Distinguishable)	A	supports			
1.4.2	Audio Control: If any audio on a Web page plays automatically for more than 3 seconds, either a mechanism is available to pause or stop the audio, or a mechanism is available to control audio volume independently from the overall system volume level. (Distinguishable)	A	supports			
1.4.3	Contrast (Minimum): The visual presentation of text and images of text has a contrast ratio of at least 4.5:1; see guidelines for exceptions: (Distinguishable)	AA	supports			
1.4.4	Resize text: Except for captions and images of text, text can be resized without assistive technology up to 200 percent without loss of content or functionality.	AA	supports	Available from browser functionality		
1.4.5	Images of Text: If the technologies being used can achieve the visual presentation, text is used to convey information rather than images of text; see guidelines for exceptions; (Distinguishable)	AA	supports	Supports alternative text		
Guidelines for "Operable" Content			*Operable* - User interface components and navigation must be operable, including ability to make all functionality available from a keyboard, give users enough time to read and use content, not use content that causes seizures and help users navigate and find content.			
2.1.1	Keyboard: All functionality of the content is operable through a keyboard interface without requiring specific timings for individual keystrokes, except where the underlying function requires input that depends on the path of the user's movement and not just the endpoints. (Keyboard Accessible)	A	supports			
2.1.2	No Keyboard Trap: If keyboard focus can be moved to a component of the page using a keyboard interface, then focus can be moved away from that component using only a keyboard interface, and, if it requires more than unmodified arrow or tab keys or other standard exit methods, the user is advised of the method for moving focus away. (Keyboard Accessible)	A	supports			
2.2.1	Timing Adjustable: For each time limit that is set by the content, at least one of the following is true--select any/all that apply: (Enough Time)	A				
	Turn off: The user is allowed to turn off the time limit before encountering it; *or*		does not support		list date full support planned, if any >	N/A

	Adjust: The user is allowed to adjust the time limit before encountering it over a wide range that is at least ten times the length of the default setting; **or**		does not support		list date full support planned, if any >	N/A
	Extend: The user is warned before time expires and given at least 20 seconds to extend the time limit with a simple action (for example, "press the space bar"), and the user is allowed to extend the time limit at least ten times; **or**		supports	Time out warnings are given to users before log out automatic		
	Real-time Exception: The time limit is a required part of a real-time event (for example, an auction), and no alternative to the time limit is possible; **or**		supports			
	Essential Exception: The time limit is essential and extending it would invalidate the activity; **or**		supports	Access takes into account user's idle time		
	20 Hour Exception: The time limit is longer than 20 hours.		guideline not applicable			
2.2.2	Pause, Stop, Hide: For moving, blinking, scrolling, or auto-updating information, all of the following are true: (Enough Time)	A				
	Moving, blinking, scrolling: For any moving, blinking or scrolling information that (1) starts automatically, (2) lasts more than five seconds, and (3) is presented in parallel with other content, there is a mechanism for the user to pause, stop, or hide it unless the movement, blinking, or scrolling is part of an activity where it is essential; **and**		guideline not applicable	No such feature to scroll content in SF classic		
	Auto-updating: For any auto-updating information that (1) starts automatically and (2) is presented in parallel with other content, there is a mechanism for the user to pause, stop, or hide it or to control the frequency of the update unless the auto-updating is part of an activity where it is essential.		guideline not applicable			
2.3.1	Three Flashes or Below Threshold: Web pages do not contain anything that flashes more than three times in any one second period, or the flash is below the general flash and red flash thresholds. (Seizures)	A	guideline not applicable			
2.4.1	Bypass Blocks: A mechanism is available to bypass blocks of content that are repeated on multiple Web pages. (Navigable)	A	supports w/exceptions	Requires some VF logic / screen sequences (flows)		
2.4.2	Page Titled: Web pages have titles that describe topic or purpose. (Navigable)	A	supports			
2.4.3	Focus Order: If a Web page can be navigated sequentially and the navigation sequences affect meaning or operation, focusable components receive focus in an order that preserves meaning and operability. (Navigable)	A	supports			
2.4.4	Link Purpose (In Context): The purpose of each link can be determined from the link text alone or from the link text together with its programmatically determined link context, except where the purpose of the link would be ambiguous to users in general. (Navigable)	A	supports			
2.4.5	Multiple Ways: More than one way is available to locate a Web page within a set of Web pages except where the Web Page is the result of, or a step in, a process. (Navigable)	AA	supports	Global search		
2.4.6	Headings and Labels: Headings and labels describe topic or purpose. (Navigable)	AA	supports			
2.4.7	Focus Visible: Any keyboard operable user interface has a mode of operation where the keyboard focus indicator is visible. (Navigable)	AA	supports			
Guidelines for "Understandable" Content			***Understandable*** - Information and the operation of user interface must be understandable, including ability to make text readable and understandable, make content appear and operate in predictable ways and help users avoid and correct mistakes.			
3.1.1	Language of Page: The default human language of each Web page can be programmatically determined. (Readable)	A	supports			
3.1.2	Language of Parts: The human language of each passage or phrase in the content can be programmatically determined except for proper names, technical terms, words of indeterminate language, and words or phrases that have become part of the vernacular of the immediately surrounding text. (Readable – Level AA)	AA	supports			
3.2.1	On Focus: When any component receives focus, it does not initiate a change of context. (Predictable)	A	supports			
3.2.2	On Input: Changing the setting of any user interface component does not automatically cause a change of context unless the user has been advised of the behavior before using the component. (Predictable)	A	does not support	Depending on VisualForce page, if such pages are used.	list date full support planned, if any >	TBD
3.2.3	Consistent Navigation: Navigational mechanisms that are repeated on multiple Web pages within a set of Web pages occur in the same relative order each time they are repeated, unless a change is initiated by the user. (Predictable)	AA	supports	Consistent naviagtion experience		
3.2.4	Consistent Identification: Components that have the same functionality within a set of Web pages are identified consistently. (Predictable)	AA	supports	Depending on data model (record types can drive this for example)		
3.3.1	Error Identification: If an input error is automatically detected, the item that is in error is identified and the error is described to the user in text. (Input Assistance)	A	supports			
3.3.2	Labels or Instructions: Labels or instructions are provided when content requires user input. (Input Assistance)	A	supports			

3.3.3	Error Suggestion: If an input error is automatically detected and suggestions for correction are known, then the suggestions are provided to the user, unless it would jeopardize the security or purpose of the content. (Input Assistance)	**AA**	supports			
3.3.4	Error Prevention (Legal, Financial, Data): For Web pages that cause legal commitments or financial transactions for the user to occur, that modify or delete user-controllable data in data storage systems, or that submit user test responses, at least one of the following is true--select any/all that apply: (Input Assistance)	**AA**				
	Reversible: Submissions are reversible; *or*		does not support		list date full support planned, if any >	N/A
	Checked: Data entered by the user is checked for input errors and the user is provided an opportunity to correct them; *or*		supports	Field validations, formulas		
	Confirmed: A mechanism is available for reviewing, confirming, and correcting information before finalizing the submission.		supports	Field validations, formulas, triggers		
Guidelines for "Robust" Content		*Robust* - Content must be robust enough that it can be interpreted reliably by a wide variety of user agents, including assistive technologies and ability to maximize compatibility with current and future user tools.				
4.1.1	Parsing: In content implemented using markup languages, elements have complete start and end tags, elements are nested according to their specifications, elements do not contain duplicate attributes, and any IDs are unique, except where the specifications allow these features. (Compatible)	**A**	supports	Every Salesforce object (master data and metadata) have unique IDs, and can be queried, qualified		
4.1.2	Name, Role, Value: For all user interface components (including but not limited to: form elements, links and components generated by scripts), the name and role can be programmatically determined; states, properties, and values that can be set by the user can be programmatically set; and notification of changes to these items is available to user agents, including assistive technologies. (Compatible)	**A**	supports	Content can be controlled / adjusted in user profile / user settings (by user)		

REFERENCES

WCAG 2.0
Section 508 Standards
Texas Health & Human Services: HHS EIR Accessibility Procedures
World Wide Web Consortium

Attachment E: Concept of Operations Requirements Compliance

Vendor Name:	Slalom / Salesforce

Element No.	Element Title	Statement of Compliance	Implementation Approach	Notes
1.1	Account Setup	Standard Product	This is the creation of an account that the applicant will use to submit all Admissions-related applications.	Community users are able to maintain their account on the community / portal
1.2	Social Security Number Waiver	Standard Product	This is the form for foreign applicants to indicate they do not have a US Social Security Number	Foreign applicants will be able to fill in a form to indicate / justify not having a US SSN
1.3	Application Access Portal	Standard Product	This is the web-portal that provides access to external AIMS users	Salesforce community allows external users to maintain their profile and to create requests / applications and check their status.
1.4	Social Security/Registration Number Correction	Standard Product	This enables the correction of Social Security Numbers	Many tools / options available for merging contacts / accounts
2.1	Registration - On-line	Standard Product	This is the initial State Bar Registration Application Process. The new requirement being to apply on-line.	Applicants will be able to register online, and to answer / document key fields as required
2.2	Manual Entry of Registration	Standard Product	This addressed the current manual registration process. In future when manual is allowed State Bar staff will enter using standard application form.	Bar Staff will be able to register in the system those users not able to register onine themselves
2.3	Registration Outcome	Standard Product	This addresses the types of outcome for the registration process and determines an applicants next allowed step.	Registration outcome will be handled as part of the case management process, with various fianl statuses (denied, approved, etc.)
2.4	Upload of Registration	Standard Product	This applies to the current third party process that will be replaced by a transfer to State Bar process as soon as a correct submittal is completed.	Upload data to SF is simple, and can be done with various OOTB tools

Attachment E: Concept of Operations Requirements Compliance

Element No.	Element Title	Statement of Compliance	Implementation Approach	Notes
2.5	MJP Registered In-House Counsel	Standard Product	This is related to registration for lawyers requesting specific rights in the State of California.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
2.6	MJP Registered Legal Services Attorney	Standard Product	This is related to registration for lawyers requesting specific rights in the State of California.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
2.7	Disciplined Attorneys	Standard Product	This is the application process for Lawyers being allowed to restore rights as a registered lawyer.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
2.8	Register for Law Office Study	Standard Product	This is the form for indicating specialized legal training.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
2.9	Apply as Foreign Legal Consultant	Standard Product	This is the application for enabling a foreign lawyer consulting rights in California	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
3.1	Evaluation of Pre-Legal Education	Standard Product	This is the process for evaluation of pre-legal education based upon registration and transcript information.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
3.2	Evaluate Legal Education	Standard Product	This is the process to evaluate legal education and a determination if the first year law student examination is required.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
3.3	Law Office Study Evaluation	Standard Product	This is the process to evaluate that quality of specialized law office legal study	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
4.1	Bar Examination Application (Paper)	Standard Product	This is the base for California Bar Examination application per the current manual process. To be enforced in future as an on-line process.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)

Attachment E: Concept of Operations Requirements Compliance

Element No.	Element Title	Statement of Compliance	Implementation Approach	Notes
4.2	Bar Examination Application (Online)	Standard Product	This is the base for California Bar Examination on-line application, which will be the core process with AIMS.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
4.3	Eligibility Verification	Standard Product	This is the State Bar process to determine eligibility to take the California Bar Examination from application and submittal information.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
5.1	Examination Question Preparation	Standard Product	This deals with the process to create questions for the California Bar Examination. It is not part of the AIMS automation.	Processes can be defined for configured objects
5.2	Performance Test Drafting	Standard Product	This deals with the process to create the performance test for the California Bar Examination. It is not part of the AIMS automation	Processes can be defined for configured objects
6.1	Event Contracts	Standard Product	This is the process to link contracts for examination locations to the examination logistics processes.	Contracts Management
6.2	Test Materials Preparation & Delivery	Can Be Integrated	This is a logistics process to determine the materials for each test site and get the materials delivered and tracked.	App Exchange solutions are available; we will select the best fit / cost effective after further review of requirements
6.3	Test Materials Return	Can Be Integrated	This is a logistics process to make sure examination materials are correctly returned to State Bar offices.	App Exchange solutions are available; we will select the best fit / cost effective after further review of requirements
6.4	Proctor Management	Standard Product	This illustrates the process for assigning and tracking examination proctors. It feeds into the automated process to for proctor profile and activity history.	Case assignment, resources management
7.1	Grader Selection	Standard Product	This is how graders are selected and provides information about how grader information should be brought into an automated tracking process by individual.	Case assignment, resources management

Attachment E: Concept of Operations Requirements Compliance

Element No.	Element Title	Statement of Compliance	Implementation Approach	Notes
7.2	Essay Answers Packaging for Grading	Can Be Integrated	This is both logistics and examination management process to provide essay questions for grading. The actual grading process is not part of the Grade Reporting process.	Scanning solutions available on App Exchange
7.3	MBE Answers Packaging for Grading	Can Be Integrated	This is the process of collecting MBE answer sheets from exam sites and sending them to the National Committee of Bar Examiners.	App Exchange solutions are available; we will select the best fit / cost effective after further review of requirements
7.4	Grading & Reporting	Standard Product	This is the process of collecting and grading exams and reporting the pass/fail status to examinees.	Processes can be defined for configured objects
8.1	Request New Test Accommodations & Review	Standard Product	This includes the application for accommodations by the applicant, the Bar's review and decision process, and collaboration between both offices to ensure correct preparation.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
8.2	Test Accommodation Appeal	Standard Product	This is when an applicant who's been denied accommodations appeals the decision to the Sr. Director and the Committee.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
8.3	Application for Same Test Accommodation	Standard Product	This is the process of requesting a previously granted accommodation should the applicant still be eligible for it.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
8.4	Prepare Test Accommodation for Examinations	Can Be Integrated	This is the process of ensuring all accommodation materials are ready to be used during exams.	App Exchange solutions are available; we will select the best fit / cost effective after further review of requirements
9.1	Moral Character Application	Standard Product	This is the process by which the applicant will apply for determination of their moral character.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
9.2	Moral Character Investigation (Coordinators)	Standard Product	This is the process by which Moral Character Coordinators in the LA office process applications.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)

Attachment E: Concept of Operations Requirements Compliance

Element No.	Element Title	Statement of Compliance	Implementation Approach	Notes
9.3	Moral Character Investigation (Analysts)	Standard Product	This is the process by which Moral Character Analysts in the SF office process applications.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
9.4	Moral Character Decision and Reporting	Standard Product	This is the process by which Moral Character determinations are relayed to applicants.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
9.5	Moral Character Appeal	Standard Product	This is the process by which negative Moral Character determinations are appealed by applicants.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
10.1	First Year Law Student Exam Application (Paper)	Standard Product	This is the process by which applicants will submit a hard copy application to take the FYLSX.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
10.2	First Year Law Student Exam Application (Online)	Standard Product	This is the process by which applicants will submit an online application to take the FYLSX.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
10.3	Eligibility Verification	Standard Product	This is the process by which the Eligibility department will verify the applicant's eligibility to take the FYLSX.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
10.4	Examination Question Preparation & Pool	Standard Product	This is the process by which the FYLSX is developed.	Custom objects can be created Declaratively
10.5	Examination Grading & Reporting	Standard Product	This is the process of grading the FYLSX and reporting results to applicants.	HEDA + configured objects
11.1	Group Motions	Standard Product	This is the process of producing group motions after each exam.	Lightning Process Builder can be used to generate criteria based events to specific contact (email alerts)

Attachment B

Attachment E: Concept of Operations Requirements Compliance

Element No.	Element Title	Statement of Compliance	Implementation Approach	Notes
11.2	Weekly Motions	Standard Product	This is the process of producing weekly motions, taking into account issues that prevented an applicant from appearing on the group motion.	Lightning Process Builder can be used to generate criteria based events to specific contact (email alerts)
11.3	Notification of Approved Motion	Standard Product	This is the process of notifying applicants that the Supreme Court of California has approved the motion they appear on.	Lightning Process Builder can be used to generate criteria based events to specific contact (email alerts)
12.1	Order Certificate	Can Be Integrated	This is the process an attorney will take after being sworn in.	Salesforce service products + forms + payment solution
13.1	List of Schools	Standard Product	This is the process of ensuring that the list of law schools has up-to-date information.	OOTB with HEDA
13.2	School Regulation	Standard Product	This is the process of enforcing rules set by the Committee relating to accreditation and registration of schools.	OOTB with HEDA
14.1	Legal Specialization Interest Tracking	Standard Product	This is the tool that LS will use to keep a list of attorneys who would like to receive information about specializations.	Salesforce Campaign Management or Lightning Process Builder
14.2	Legal Specialization Qualification Tracking	Standard Product	This is the tool that attorneys will use to track their progress toward being qualified to receive a certification.	Account mgmt + field validation, etc.
14.3	Legal Specialization Exam Writing & Grading	Standard Product	This is the process of developing the LS exam and grading completed exams.	HEDA + configured objects
14.4	Legal Specialization Exam Application	Standard Product	This is when an attorney applies to take one of the 13 LS exams.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)

Attachment E: Concept of Operations Requirements Compliance

Element No.	Element Title	Statement of Compliance	Implementation Approach	Notes
14.5	Legal Specialization Certification Application	Standard Product	This is when an attorney applies to receive a LS certification once all requirements have been met.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
14.6	Legal Specialization Re-Certification	Standard Product	This is when an attorney applies to be re-certified by the LS Office.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
15.1	SBC Website	Standard Product	This explains the relationships between the website, portals, and potential user portals.	Salesforce allows seamless integration between various communities for a given organization. The user navigate communities based on profile specific access
15.2	Document Management	Standard Product	This explains the uses of the Document Management function.	Salesforce Content Management Solution
15.3	Master Calendar	Standard Product	This explains possible uses of the Master Calendar function.	Salesforce provides various OOTB features to handle this (custom settings, etc.)
15.4	Contract Management	Standard Product	This explains the use of the Contract Management function.	Contract Lifecycle
16.1	SBC User Access	Standard Product	This is the roles based secure access to AIMS applications by State Bar (SBC) employees.	Communities + Profiles for access management
16.2	External-Applicant User Access	Standard Product	This is the role based secure access to State Bar applicants. This is linked to the applicant portal and to Account (Profile) establishment.	Communities + Profiles for access management
16.3	External User Access	Standard Product	This explains possible external users of the system and their need to access it.	Communities + Profiles for access management

Attachment E: Concept of Operations Requirements Compliance

Element No.	Element Title	Statement of Compliance	Implementation Approach	Notes
17.1	Start Legal Education Over Notification	Standard Product	This explains the process of an applicant requesting to start their legal education over, and of the State Bar's management of previously entered data.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
18.1	Out-Of-State Attorney Arbitration Counsel and Pro Hac Vice	Standard Product	This is the process of applying for the OSAAC and PHV programs with the Bar.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
18.2	Practical Training of Law Students	Standard Product	This is the process of applying for PTLS.	Will leverage Case Mgmt to deliver this process (evaluation, escalation, etc.)
19.1	File Room	Can Be Integrated	This explains the structure that dictates which files are stored and in what order.	Doument Mgmt System + Barcode solution

Attachment F: Requirements Gaps and Exceptions

Based upon the compliance information provided in Attachment B the proposer shall indicate gaps in information required for system delivery or exceptions to requirements.

1. Describe requirements gaps with identification of the Concept of Operations Element number or identifier used in Attachment B.

2. With each gap describe approach for resolution.

The response can be multiple pages if necessary.

Gap #1: Document Management System (element 15.2)
We recommend CBS leverages an AppExchange solution for Document mgmt / file storage. There are many tools available, some of them with plug-ins/apps on the Salesforce AppExchange and we will help CSB identify the most cost effective that fits your requirements.

Gap #2: Event Management (element 6.1 6.4))
The Salesforce Service Cloud does not provide a robust out of the box solution for Event/Exam Management, which is needed for the organization of Exam / sessions / Proctors Management. There are many applications available on the Salesforce AppExchange that can handle those requirements and we will help CSB identify the best solution for its needs (functional fit, cost effective, etc.).

Gap #3: Inventory Management (Element 6.2 and 6.3)
The Salesforce Service Cloud does not provide an out of the box solution for Inventory Management, which is needed for the logistics / tracking of Exam Materials.
There are many applications available on the Salesforce AppExchange that meet those requirements and we will help CSB identify the best solution for its needs (functional fit, cost effective, etc.).

Gap #4: Forms management (useful in most application processes: CBX, FYLSX, LS, TA, etc.)
The Salesforce Service Cloud does not provide a robust out of the box solution for Form Management, which is needed for forms filing by Law Students / Bar members.
There are many applications available on the Salesforce AppExchange that meet those requirements and we will help CSB identify the best solution for its needs (functional fit, cost effective, etc.).

Gap #5: Barcode integration (File room – Element 19)
The Salesforce Service Cloud does not provide an out of the box solution for Barcode integration. There are many applications available on the Salesforce AppExchange that meet those requirements and we will help CSB identify the best solution for its needs (functional fit, cost effective, etc.).

Gap #6: Grading System.
Depending on the complexity of the calculation, we will either use formulas or custom code to provide the functionality.

The proposer shall identify their exceptions to requirements or functionality associated with their proposed solution.

3. The proposer shall indicate if their solution has an alternative that addresses the exception topic.

For each of the gaps identified, an alternate solution is to create your own application (via declarative / custom) configuration.
The advantage of this approach is no fees would be incurred from the AppExchange Application provider.
The flexibility and robustness of the platform make this approach a good alternative when the requirements are not very complex. (for instance, simple event management processes)
Complex requirements often require complex code, and mean more complex lifecycle and maintenance.
Also, it is usually a better practice to not build complex applications, but to instead acquire already built applications.

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-001	**Project Management:** Requirements in this category outline specific management and control services associated with the implementation of the System. Meeting these requirements will help ensure that the Vendor conducts proper project planning, execution, and monitoring and controlling of project activities. Required deliverables are described below.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-001.01	Prepare Project Management Plan: Based on the agreed-upon scope of work and other agreements in contract negotiation, the Vendor, working with State Bar project manager is required to develop a comprehensive and detailed project management plan. The project management plan should reflect best practices in project management applied to the unique needs of the project. The project management plan must include the following elements: • Project organization, including structure, roles, responsibilities, and human resource management. • Project work breakdown structure and schedule, fully loaded with dependencies and resource requirements. • Approach to managing scope, budget, and schedule. • Approach to ensuring effective project communication. • Approach for identifying, tracking, and resolving issues and risks, including roles, responsibilities, escalation process, and tools for reporting issues and risks to the State Bar project manager. • Approach to configuration management for reviewing, accepting, and maintaining version control on all project deliverables. The Vendor is required to submit the draft project management plan to the State Bar IT project manager 10 business days after the finalization of the project contract. Upon review and acceptance, the final project management plan will serve as the basis for controlling all project management activities.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-001.02	Provide Project Management: Under the direction of state bar Sr IT Management and IT Program management The Vendor will be responsible for the ongoing planning, monitoring, controlling, and reporting of project performance across projects within the scope of this engagement. The Vendor shall coordinate its project management efforts and reporting with the efforts of the State Bar. In addition, the Vendor will coordinate its efforts and reporting with the State Bar. All of these efforts are under the direction of the State Bar IT project manager. The Vendor will provide effective project management for all of the contracted services and product delivery. The Vendor shall provide sufficient project management services to: • Ensure that all deliverables are produced according to contract schedule. • Respond to reasonable inquiries about project status and risks in a timely manner. • Identify issues, risks, and alternative solutions and notify the State Bar with sufficient time for the State Bar to effectively address these matters.	Agrees to Perform	This deliverable/activity is part of our methodology and standard deliv
SVC-001.03	Produce Written Status Report: The Vendor will be required to deliver project status reports at a later determined frequency to the State Bar IT project manager and the project sponsor throughout the duration of the project. Project status reports are intended to be relatively brief snapshots of the project's status and should consist of the following information: • Updated project work plan, schedule, staff plan, and budget. • Report of project status and performance against all plans. • Progress against the project work plan completed in the reporting period. • Variance in schedule between actual and planned activities. • Planned activities for the subsequent reporting period. • Report of issues and issue resolution efforts and progress. • Report of risks and risk mitigation efforts and progress.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-001.04	Attend Status Meetings and Steering Committee Meetings: In conjunction with status reports, the Vendor will be required to attend status meetings later determined frequency to be held between key project team members. Additionally, The Vendor may be required to provide a brief in-person presentation to the Steering Committee regarding the status of the project.	Agrees to Perform	
SVC-002	**System Design, Configuration, and Construction:** Requirements in this category include all activities necessary to develop, assemble, and otherwise prepare the proposed system for implementation. The nature of the proposed system may determine to some degree the activities necessary to complete this phase of work. However, it is anticipated that these activities will include, at a minimum:	Agrees to Perform	This deliverable is part of our methodology and standard deliverables

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-002.01	Prepare system Design, Configuration, and Construction Plan: The Vendor will be required to submit its plan for assembling the proposed components into a single system for deployment to the State Bar. The Vendor's plan should include the Admissions Information Management System (AIMS), the Legal Specialization Application, the Examination Grading Applications and supporting functionality and modes that has been documented and approved for the State Bar of California. The schedule and resources required for system design, configuration, and construction should be reflected in the project management plan. This plan must include, at a minimum: • Approach to design, configuration, and configuration/construction. • Design, configuration, and configuration/construction schedule. • Resources required (State Bar Subject Matter Experts (SMEs), State Bar IT, and Vendor) for each step in configuration/construction.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-002.02	Conduct Requirements Gap Analysis: The Vendor must (working with a representative group of SMEs selected by the State Bar) conduct and complete business and technical analysis to determine the gaps between the needs of the affected departments as reflected in the Concept of Operations and what the Vendor's system provides. This analysis must incorporate the Vendor's response to requirements as presented in the Vendor's proposal (and modified in contract negotiations), as well as the approved system requirements and design. Major gaps that are identified must be accompanied by a plan for resolving each gap through system configuration, additional development, or additional component incorporation. This analysis must result in a detailed inventory of system customizations or other modifications required meeting the needs of the State Bar.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-002.03	Track Requirements to Implementation: The Vendor must provide a mechanism for tracking adherence to the requirements identified in this RFP, including the Concept of Operations, as well as additional requirements identified in gap analysis and system design activities. This mechanism must support change management and system testing, including user acceptance testing. The Vendor must populate, maintain, and provide State Bar with access on demand to this tool and the information it maintains.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-002.04	Design the System: The Vendor must provide functional and technical design documentation for AIMS and supporting applications along with the libraries, tools, and facilities to maintain this documentation. This documentation shall include: • Use case documentation. • Data dictionary. • Information Exchange Packet documentation. • Network design, inventory, protocols, and configuration. • Security design. • Hardware design, configuration, and inventory. • Application design and inventory. • Change control documentation for all aspects of the design.	Agrees to Perform	This deliverable/activity is part of our methodology and standard deliv
SVC-003	**Perform System Testing:** Requirements in this category will include activities necessary to assure that system is delivered into production with a minimum number of defects. Requirements will include planning, preparation and testing activities:	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-003.01	The Vendor must provide a detailed test plan for testing every aspect of the system in accordance with agreed upon project delivery methodology. The Vendor must also provide a test environment if Vendor is proposing a hosted solution. The test plan and environments must support the testing of all planned major and minor releases by both the Vendor and State Bar IT teams. Final overall test plan must be approved by State Bar. In addition, test plans and environment structure must describe and support testing of: • All functional requirements defined in the requirements traceability deliverable. • All performance requirements.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables

Attachment G: Service Requirements

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SVC-003.02	Upon completion of any release, major or minor, the Vendor shall provide a workable version containing the release, for testing by the State Bar. Every release should contain all tested prior releases and should be available for the State Bar to retest as part of the testing cycle. It is expected that the following test cycles will be implemented prior to the completion of this project: • Smoke Testing: All high-level or core functionality will be tested. Smoke tests will be run with every deployment to assist in identifying significant defects. • Functional Testing: Detailed functional testing will be conducted to evaluate the compliance of the system or component with specified functional requirements. • Regression Testing: To ensure that the existing functionality is not affected by the new released features, enhancements, or prior defect corrections. • Performance & Stress Testing: To ensure the stability, scalability, and performance of the system and its underlying architecture. • Security Testing: The Vendor is expected to system satisfies the State Bar's security requirements and user access controls. • Automated test tools supporting all prototype, release, and deployment testing. • Automated test scripts, test data, and other testing tools/materials. • Documented test results, to be provided to the State Bar IT project manager. This deliverable must provide the State Bar with the infrastructure, licenses, and training to efficiently test new releases and deployments of the system and its interaction with other State Bar applications. It is also expected that the Vendor will support all the agreed upon test cycles throughout the implementation process.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-003.03	Vendor must support testing activities performed by the State Bar IT and business SME's. Support shall include the following components: • Daily defect review meetings conducted jointly with the Vendor testing and development leads and State Bar IT team • Defect resolution • Defect tracking tool, communicating at minimum defect analysis outcomes and resolution timeline commitment. Tool shall have a reporting capability providing a concise view of all defects in all states of resolution. Tool shall be accessible by the State Bar IT team.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-003.04	User Acceptance Testing: Once the configured system is released to the UAT site, the Vendor will support the State Bar staff in conducting the User Acceptance Testing in accordance with the User Acceptance Test Plan, which will include all developed test cases/scenarios, to verify that the system operates in the manner expected, and that all configurations are suitable for intended business processes.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables

Attachment G: Service Requirements

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SVC-004	**System Delivery:** It is required that depending on the delivery approach the Vendor will provide and assist with the implementation of multiple production releases, until full functionality requested in this RFP is fully operational and with agreed upon number of remaining defects. The Vendor shall work closely with the State Bar Project Team to determine the best deployment and system implementation approach for the four departments that are included in this implementation.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-004.01	Produce Pilot Release(s) For a Subset of Users: These releases shall include and implement facilities and procedures for software promotion from construction through testing and into production (along with rollback facilities and procedures). This deliverable will include all software required for system operation. This shall include both technical and functional configurations. Depending on the delivery approach this deliverable will include one or more releases.	Agrees to Perform	This deliverable/activity is part of our methodology and standard deliv
SVC-004.02	Produce Production Release(s): These releases shall include and implement facilities and procedures for software promotion from construction through testing and into production (along with rollback facilities and procedures). This deliverable will include all software required for system operation. This shall include both technical and functional configurations. Depending on the delivery approach this deliverable will include one or more releases.	Agrees to Perform	This deliverable/activity is part of our methodology and standard deliv
SVC-004.03	Produce Hot Fix Release(s): Within 1 week of each Production Release if any critical or major defects are identified, vendor shall delivery a Hot Fix release(s) to resolve such defects. Vendor shall develop an expedited delivery cycle which will include all activities performed during the Production Release cycle.	Agrees to Perform	Patch Releases and Daily Releases are used to deliver scheduled an
SVC-004.04	Prepare Plan for Additional Releases: It is anticipated that once the final Production Release of the system has been in operation for 3 months, modifications to the system based upon the lessons learned from initial production operations will be identified. In addition, it is anticipated that the Vendor will have updated plans for the evolution and releases of the underlying COTS application. The Vendor shall prepare a plan for the design, development, and testing of what will be the final major release of the production system. In addition, the Vendor will outline the plans for the next two versions of the System.	Agrees to Perform	90 days stabilization post-release provided by Slalom (Level 2)
SVC-005	**System Implementation:** Services and deliverables include all of the activities necessary to configure and deploy the system assembled in the previous subsection. Services associated with this phase of work are required to be:	Agrees to Perform	This deliverable is part of our methodology and standard deliverables

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments

SVC-005.01	Prepare Deployment Plan:
	The Vendor shall develop a comprehensive deployment plan that provides details on the schedule, approach, and resources necessary to deploy Production Release(s) of the System . The plan will include:
	• Location(s).
	• Schedule.
	• Scope and objectives of all Production Release(s) with effort estimation for each activity
	• Steps required to roll back the Production Release(s) implementation to pre-implementation operations.
	• Communication plan
	• Tasks, human resources, and other resources required for implementation, including:
	  o State Bar IT Staff.
	  o State Bar Business Staff
	  o Vendor
	It must effectively factor in lead time for resource ordering, data conversion, and deployment. It must also address parallel processing procedures if appropriate. Final overall Deployment Plan must be approved by State Bar.
		Agrees to Perform	This deliverable is part of our methodology and standard deliverables

SVC-005.02	Assist Configuration: It is anticipated that the system will be configured to meet the needs of the State Bar. The Vendor will train the designated management and technology support staff to make optimal configuration decisions and assist them in implementing and testing system configuration.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-005.03	Perform Data Conversion: It is expected that the Vendor will begin conversion efforts upon contract completion. The Vendor must perform an in-depth analysis of current data structures and values and develop a plan for converting data and procedures for migrating and validating data. It is anticipated that this will include three or more tests of the conversion to ensure that conversion expectations are met. After receiving State Bar approval, the Vendor must convert existing data based on the combined efforts of State Bar IT and business staff and the Vendor.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-005.04	Assist Testing: The Vendor will assist the management and staff in pre-production testing of the configured application and converted data. The Vendor shall work with State Bar and design a structured and repeatable testing protocol that: • Supports the implementation schedule. • Employs automated testing tools to minimize the staff required to fully test the implementation of the system. • Enables testing of parallel processes as appropriate. State Bar staff will lead and perform testing. The Vendor will be responsible for: • Implementation of the testing environments, data, and tools required. • Development of the repeatable testing protocols and scripts. • Component and business analysis support. • Troubleshooting. The Vendor shall resolve all defects discovered in this testing in a timely manner and prior to production operations.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-005.05	External User Migration: The Vendor must provide a plan to migrate external users from using the third party application process to the AIMS application process in a fashion that has a period of parallel operation. The Vendor must also provide a plan for introducing the use of the Legal Specialization Application to external users and providing a web-access to the those functions. The migration of State Bar staff requires a migration plan with State Bar approval.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-005.06	Support Production System Deployment: The Vendor will provide on-site support of management and technology support staff for all technical activities in locations specified in the Deployment Plan.	Agrees to Perform	The support for the system implemented will last for 2 weeks after each deployment. Afterwards, it is up to Cal State Bar to either switt to Salesforce support plan, or to reqest a SOW / Change order from Slalom.
SVC-006	**Training:** Implementing a new system will require specific training services for all software and its components. These services will include planning and coordination, development of training materials and tools, and delivery of training to State Bar IT, the management and staff.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-006.01	Plan for Training: The Vendor must provide a training plan that details the approach to training and how training for the users and administrators of the system will be delivered. The plan should detail how training will be tailored to specific roles within the State Bar. Training deliverables must include classroom sessions. All training materials shall be effectively cataloged, reusable, and modifiable by the State Bar.	Agrees to Perform	Slalom is proposing a thorough Change Management plan that encor

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-006.02	Provide Predesign Training of Personnel: It is anticipated that the project staff and management will need to make well-informed design decisions throughout this engagement. The Vendor will provide training on all software components to the project staff and management upon contract completion. This should include training on the technical and functional features and controls of all of the components that make up the system. This training should identify the design decisions that will be made in preparing the system for implementation.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-006.03	Provide system User and Administrator Training: The Vendor will be required to provide training on all system software components. The training approach should be tailored to the various roles within the State Bar. The training approach should: • Account for specific roles, such as various levels of users, business administrator, technical administrator and developer • Focus training to develop the knowledge and skills needed to effectively use and configure (including development) new system components according to the activities of each role. • Assist the State Bar in managing, changing, and improving business processes using the new system. • Employ a train-the-trainer approach at a minimum. • Employ in-application help. • Deliver on-site training at both State Bar sites. • Consider the limitations of training facilities in each site.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-006.04	Produce Training Documentation: The Vendor will be required to provide training and technical documentation for all system software components. Documentation should include, but is not limited to: • Step-by-step process instructions. • Standard operating procedures. • General system administration. • Technical configuration. • System maintenance. • Troubleshooting procedures • Technical documentation, including DataBase schema and entity relationship diagram. All training documentation should be provided in electronic form.	Agrees to Perform	This deliverable is part of our methodology and standard deliverables
SVC-007	**System Support:** System support services include all of the activities necessary to maintain, efficiently update, and generally support the system in the event of technical or other issues. At a minimum, the Vendor will be expected to provide the following services:	Proposing Alternative	This deliverable is part of our methodology and standard deliverables

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-007.01	Version and Patch Release Management: The Vendor must provide a plan and structure for managing requests for system modifications and bug fixes. This structure shall be designed to operate under the direction of the State Bar IT project manager. Any issue that requires a system-wide change must be tracked and included in either a patch for critical issues or a future release for functionality expansions or noncritical issues. Given the component-based nature of the system, a critical element of release management will be the methods used to ensure that a version update to a single system component does not "break" the interactions that the component has with other system components by altering data structures or processing models. Releases must be well documented, identifying the nature of the changes made, configuration issues, and changes in business processes. The Vendor must provide a plan and protocol for planning, announcing, developing, testing, and deploying releases to ensure that software updates do not interrupt critical business processes.	Proposing Alternative	Patch Releases and Daily Releases are used to deliver scheduled and ad hoc application fixes and are typically seamless to customers. Whenever possible, patches and daily releases are deployed during off-peak hours and without downtime. Patch releases are scheduled weekly and are usually deployed to instances on Tuesday, Wednesday or Thursday, with release to Asia-Pacific instances the following day. Daily releases are conducted on an as-needed basis and can occur any day of the week. Release Maintenance is for upgrading Salesforce services to the latest product version to deliver enhanced features and functionality. There are three different kinds of release maintenance: major releases, patch releases, and emergency releases. Major Release Maintenance dates and times are posted on trust.salesforce.com approximately one year before the release date. To see the schedule for your instance click on http://trust.salesforce.com/trust/instances and select the relevant instance. On the calendar click the release date to view further
SVC-007.02	Backup and Recovery Procedures and Tools: The Vendor must provide procedures and tools for system and data backup and recovery to support the system availability performance requirements. Backup and recovery practices and procedures must be consistent with State Bar IT standards. They should leverage State Bar IT backup and recovery facilities and procedures.	Proposing Alternative	Data Recovery is a process where Salesforce Support can recover your data at a specific point in time in case it has been permanently deleted or mangled during a data import. Data Recovery was formerly known as "Data Restoration."
SVC-007.03	On-Site Support: The Vendor shall provide on-site technical support for activities associated with implementation of the system. This will be provided throughout the course of implementation. This support must be provided for a period of 3 months after the system is in production operation.	Proposing Alternative	Salesforce proposes various levels of support, see conditions at https://www.salesforce.com/services/success-plans/overview/ Standard Success Plan Get up and running quickly and drive adoption with self-guided learning, online technical support, and customer communities. Premier and Premier+ Success Plans Increase productivity and ROI with expert advice and on-call technical support. Signature Success Plan Fast-track your success with Salesforce through hands-on guidance, training, and support tailored to your unique business needs.

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-007.04	Level 1 Help Desk Support (Internal State Bart Help Desk): The Vendor must assist the State Bar in establishing a Level 1 help desk support structure and staff the help desk until such time as the State Bar IT is fully capable of operating the help desk using its own staff. This Level 1 help desk support must meet the State Bar response and problem resolution time requirements for all applications in scope. It will apply to all Vendor-provided hardware, software, infrastructure, and services. It shall provide complete, accurate, and timely information about each request for service in the State Bar IT incident tracking application. The Vendor shall provide documentation and training to State Bar IT help desk staff and management. This should establish full help desk capability (at the level required for long-term system maintenance) within 6 months of the successful completion of the system implementation. The Vendor shall augment State Bar IT help desk staff until the State Bar IT has realized full help desk capability and shall provide additional resources sufficient to meet the additional short-term demand resulting from the implementation of the system.	Proposing Alternative	Train the Trainer approach will help build Level 1 support. Slalom will provide this as part of the user training. Also some certification programs will ensure your administrators have reached optimal level.
SVC-007.05	Ongoing Level 2 Support and Problem Resolution: The Vendor shall provide Level 2 help desk support that meets response and problem resolution time requirements. It will apply to all Vendor-provided hardware, software, infrastructure, and services. It will be coordinated through up to three designated State Bar IT points of contact. In addition, it shall provide complete, accurate, and timely information about each request for service in the State Bar IT incident tracking application. The Vendor shall provide support by a variety of channels, including telephone, e-mail, and Web application.	Proposing Alternative	Salesforce proposes various levels of support, see conditions at https://www.salesforce.com/services/success-plans/overview/ Standard Success Plan Get up and running quickly and drive adoption with self-guided learning, online technical support, and customer communities. Premier and Premier+ Success Plans Increase productivity and ROI with expert advice and on-call technical support. Signature Success Plan Fast-track your success with Salesforce through hands-on guidance, training, and support tailored to your unique business needs.
SVC-008	**Problem resolution protocol:** Vendor will use criteria listed below to develop a response plan for each Severity level.	Proposing Alternative	Salesforce proposes various levels of support, see conditions at https://www.salesforce.com/services/success-plans/overview/
SVC-008.01	For a Severity Level 1 event, the Vendor: • Responds to call for service in 30 minutes or less. • Reports recommended resolution and estimated fix date/time for all affected System components in 2 hours or less. • Resolves the deficiency within 24 hours.	Proposing Alternative	Salesforce proposes various levels of support, see conditions at https://www.salesforce.com/services/success-plans/overview/ Standard Success Plan Get up and running quickly and drive adoption with self-guided learning, online technical support, and customer communities. Premier and Premier+ Success Plans Increase productivity and ROI with expert advice and on-call technical support. Signature Success Plan Fast-track your success with Salesforce through hands-on guidance, training, and support tailored to your unique business needs.

Attachment G: Service Requirements

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SVC-008.02	For a Severity Level 2 event, the Vendor: • Responds to call for service in 30 minutes or less. • Reports recommended resolution and estimated fix date/time for all affected System components in 2 hours or less. • Resolves the deficiency within 24 hours if the affected System component is on the Vendor site. • Resolves the deficiency within 48 hours if the affected System component is on the State Bar site.	Proposing Alternative	Salesforce proposes various levels of support, see conditions at https://www.salesforce.com/services/success-plans/overview/ Standard Success Plan Get up and running quickly and drive adoption with self-guided learning, online technical support, and customer communities. Premier and Premier+ Success Plans Increase productivity and ROI with expert advice and on-call technical support. Signature Success Plan Fast-track your success with Salesforce through hands-on guidance, training, and support tailored to your unique business needs.
SVC-008.03	For a Severity Level 3 event (A business function or System component does not work as required, but a work-around that is acceptable to the State Bar is available.) the Vendor: • Responds to call for service in 30 minutes or less. • Reports recommended resolution and estimated fix date/time for all affected System components in 2 hours or less. • Resolves the deficiency within 72 hours if the affected System component is on the Vendor site. • Resolves the deficiency within 96 hours if the affected System component is on the State Bar site.	Proposing Alternative	Salesforce proposes various levels of support, see conditions at https://www.salesforce.com/services/success-plans/overview/ Standard Success Plan Get up and running quickly and drive adoption with self-guided learning, online technical support, and customer communities. Premier and Premier+ Success Plans Increase productivity and ROI with expert advice and on-call technical support. Signature Success Plan Fast-track your success with Salesforce through hands-on guidance, training, and support tailored to your unique business needs.
SVC-008.04	For a Severity Level 4 event (A cosmetic deficiency is discovered that is noncritical but effects business function or a System component.) the Vendor: • Responds to call for service in 30 minutes or less. • Reports recommended resolution and estimated fix date/time for all affected System components in 4 hours or less. • Resolves the deficiency within 10 business days.	Proposing Alternative	Salesforce proposes various levels of support, see conditions at https://www.salesforce.com/services/success-plans/overview/ Standard Success Plan Get up and running quickly and drive adoption with self-guided learning, online technical support, and customer communities. Premier and Premier+ Success Plans Increase productivity and ROI with expert advice and on-call technical support. Signature Success Plan Fast-track your success with Salesforce through hands-on guidance, training, and support tailored to your unique business needs.

Attachment G: Service Requirements

ID	Requirement Title	Response Code	Assumptions/ Approach/Comments
SVC-008.05	Other Software and Hardware Maintenance: The Vendor shall provide the following support and maintenance services for the products delivered and/or licensed to the State Bar IT as a part of this engagement: • Provision of known error corrections by delivery of available patches via electronic communication and for download via the Internet. • Provision of available minor updates (bundling of several error corrections in one version) for download via the Internet. • Provision of available medium upgrades (version with additional/enhanced functions) for download via the Internet. • Provision of available major upgrades (version with substantially enhanced volume of functions). • Provision of information via electronic communication (e-mail) when new minor/medium/major updates are available. • Extension of hardware manufacturer and third-party software provider warranties. The granting of rights of use and the delivery of the relevant license files for all minor, medium, and major upgrades shall be limited to the number and type of products provided by the Vendor in this engagement.	Proposing Alternative	Solution is cloud based. This does not apply.

Attachment E: Functional Guidelines

This attachment serves to describe general functional requirements that must be used across all applications. It also details disaster recovery requirements that the proposer must comply with. The proposer must respond to all three questions to both sections and use as much space as is necessary.

<u>Application Requirements</u>

External applicants for admission and for legal specialization have multiple applications to complete during their overall progress to reach their objective.

There shall be common application completion processes that shall be followed to provide applicants with application flexibility and quality application submittal. The application requirements are:

1. An applicant may suspend completion of an application with a process that saves the work done to that point and allows the applicant to exit the portal and later re-enter to continue work on the application.

2. An applicant can't proceed to the next application page or section if there are incomplete fields.

3. Common information fields such as address, phone number, etc. will be automatically filled in from the applicant profile, and the applicant may update the information. Application updates will update the application and the applicant profile information.

4. Applications shall make use of pull down for tabular information that is held in AIMS information fields (such as lists of Law Schools).

5. Upon submittal of an application a status condition shall be set that prevents an applicant from completing the same application again and resubmitting unless there has been a denial or abandonment, or equivalent for the specific application.

6. Some applications will have a period of time that controls when those applications can be completed and submitted. This is in addition to applicant status with regard to application submittals.

7. For applications that have application fees submittal shall not be completed until there is a payment acceptance indication from the credit card process. Credit card processing shall be a link to the third party process outside of AIMS.

8. Until submitted applications are held in a working database that is not the applicant database that is used by SBC for applicant information and status. The submittal process transfers the working applicant application information to the core database.

Compliance:

A. Does the proposed solution comply with the requirements identified

B. What is the proposed approach to make sure that applications do comply with the requirements?

C. Are there application process features in the proposed solution that are unique or make the process more effective?

A
The proposed solution does comply with the requirements identified.
It leverages not only Salesforce Service cloud and Communities, but also the package HEDA, or "Higher Education Architecture", to leverage a more robust data model to represent connections and relationships between applicants and their references, members of the community and the Legal ecosystem.

B
All components of the proposed solution will be revalidated during a deep dive sessions at the beginning of the project, with key stakeholders to ensure all assumptions are correct, to spell out all requirements to the required level of detail.

C
The HEDA data model will allow your community to extend to further leveraging of connections / affiliations and relationships between lawyers, law students, and partners of the community.
It will also possibly allow in the future simpler connections with Law Schools, of which many do use the HEDA architecture.

<u>Disaster Recovery</u>

The Office of Admissions must not permanently lose access to data in AIMS by any means of disaster, corruption, or system failure. The application requirements are:

1. Should there be data corruption or loss of use, all data and functions shall be available for full use within 24 hours of the failure.

Salesforce has maintained high levels of availability across all Salesforce instances since inception. As the only on-demand vendor to provide daily service-quality data on a public Web site (http://trust.salesforce.com), Salesforce proves that we are the leader in availability. And by making its track record completely transparent, Salesforce proves we are worthy of our customers' trust. To ensure maximum uptime and continuous availability, Salesforce provides the best redundant data protection and most advanced facilities protection available, along with a complete data recovery plan—all without affecting performance.

Salesforce uses commercially reasonable efforts to make its on-demand services available to its customers 24/7, except for planned downtime, for which Salesforce gives customers prior notice, and force majeure events. Excellent availability statistics are critical to Salesforce's customers' success and to the success of Salesforce as a company. Live and historical statistics on the Salesforce system performance are publicly published at https://trust.salesforce.com/en/#systemStatus.

The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.

2. The system shall have daily back-ups of the entire database.

Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned to the disaster recovery data center. Disaster recovery tests verify our projected recovery times and the integrity of the customer data.

Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). disks never leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.

The backup retention policy is 90 days (30 days for sandboxes). Deleted / modified data cannot be recovered after 90 days (30 days for sandboxes). If customers want a longer retention, they can use the weekly export feature available in the system.

Compliance:

A. Does the proposed solution comply with the requirements identified
   Yes

B. What is the proposed approach to make sure that applications do comply with the requirements?

   See answers (the solutions is built on the Salesforce platform)

Attachment E

C. Are there application process features in the proposed solution that are unique or make the process more effective?

See answers (the solutions is built on the Salesforce platform)

The Federal Risk and Authorization Management Program (FedRAMP) is a U.S. Federal government program that provides a standardized approach to security assessment, authorization, and continuous monitoring for cloud products and services. The FedRAMP program has helped to accelerate the adoption of secure cloud solutions through the reuse of assessments and authorizations across government agencies. FedRAMP leverages a standardized set of requirements, established in accordance with the Federal Information Security Management Act (FISMA), to improve consistency and confidence in the security of cloud solutions. Cloud Service Providers (CSP) that support U.S. government customers or operate on U.S. government information are responsible for complying with the requirements established by the FedRAMP program.

In May 2014, Salesforce achieved and has since maintained a FedRAMP Agency Authority to Operate (ATO) at the moderate impact level issued by U.S. Department of Health and Human Services (HHS) for the Salesforce Government Cloud.

The Salesforce Government Cloud is a partitioned instance of salesforce.com's multi-tenant community cloud infrastructure, specifically for use by U.S federal, state, and local government customers, U.S. government contractors, and Federally Funded Research and Development Centers (FFRDCs). The service model for the Salesforce Government Cloud is Platform-as-a-Service (PaaS) and Software-as-a-Service (SaaS). The Salesforce Government Cloud is comprised of the Salesforce Services (Sales Cloud, Service Cloud, Chatter, Analytics Cloud, Work.com), Force.com Platform, Industries Apps (Health Cloud, Financial Services Cloud), Platform Encryption, Communities and the backend infrastructure that support the operations of these products. A complete list of current in-scope Salesforce products included in the authorization boundary is available upon request.

	Vendor Name:		Slalom / Salesforce
ID	Requirement Text	Response Code	Assumptions/Comments
DBA Access			
DB-001	The Applications should provide the ability to access the transactional database directly for query purposes.	Currently Deployed	Salesforce.com stores data in objects and fields (closely memics tables and columns in RDBMS). Salesforce.com provides a fully structured query language (SOQL) to query and access data stored in Salesforce.com. SOQL shares many features and syntax with SQL used with RDBMS.

Salesforce organizes your data into objects and records. Think of an object as a tab on a spreadsheet, and a record like a single row of data. But unlike a traditional spreadsheet, the data is stored in Salesforce's trusted, secure cloud. Salesforce's easy-to-use interface lets you access your agency's data in sophisticated ways that you could never do with a simple spreadsheet. Your records can be linked together to show how your data is related, so that you can see the whole picture.

At the top of each Salesforce page are tabs and links for navigating to major features in Salesforce. Use the tabs to switch between objects and features. Search to find any type of record. Access user-specific customizations from the drop-down next to your name. Access help resources and training and a list of apps, each of which contain different features and tabs. With administrative privileges, you can use the Setup menu to customize Salesforce for your whole organization.

Salesforce apps are made up of tabs and pages. Standard objects such as Accounts, Contacts, and Leads, and other features such as Chatter typically have tabs, and from a tab, you navigate through pages to interact with the features you're using. For example, if you want to create an account record, you'll click the Accounts Tab, and land on the Accounts Home page.

Salesforce tabs can have multiple types of pages, including Home, Edit, and Detail pages, and you can create list views for some objects. Chatter has one primary page type: a feed. Dashboards and reports have their own page styles as well. Pages are customizable to allow users to tailor the page to their organization's specific business needs. More specifically, users are able to customize the home page in a number of ways including the Home Page Layout. Users can setup different layouts for each user profile, selecting from different components and determining their placement. Home page components include calendar, tasks, web links and search.

The most common page elements for the most frequently used objects include:
1.   A tag bar, where you can view and add tags for a record.
2.   A feed, where you can add and view comments about a record.
3.   A sidebar, where you can do things like search and quickly create new records.
4.   Sections for the record, with key fields and links.
5.   Related lists, which group and display links to other records associated with the one you're viewing. You can change the order of related lists on your page.
6.   Various links that help you move around the page or go to different pages or external sites.

The Lightning Experience user interface is a modern, productive user experience designed to help your organization work faster and be unique to each user. It's an easy-to-use experience, designed to help users work faster, with personalized alerts and an interactive assistant to help each user focus on what's important. |

DB-002	The Applications should provide the ability to export data from transactional database using system utilities.	Currently Deployed	Any standard user interface page may be viewed in a printable format and/or printed. The link to any Salesforce page may be sent via email using standard "Send Page…" browser functionality. Salesforce Reports may be exported to printed or exported to CSV data or Excel formats. Data Loading Tools Salesforce offers additional data loading tools with enhanced capabilities, such as; large uploads of data, mass updates, mass deletes, and exports for any object (e.g., Accounts, Cases, user created records). Extraction Capabilities Salesforce-based information can be bulk extracted into CSV text files for use in other systems. Salesforce supports exporting the results from reports into Microsoft Excel (.xls) or comma-separated values (.csv) formats.
DB-003	The Applications should support State Bar allowed user-creation of views to support real-time analysis.	Currently Deployed	List views make it easier to see records that are important to you. You can filter your records by field value and customize which fields to display in your list. Create a list view to see a specific set of contacts, documents, or other object records. For example, create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists. Customizable dashboards from Salesforce provide instant access to the real-time data and analysis users need to run their business. Only Salesforce gives you step-by-step wizards you can use to pull critical metrics from many departments into a consolidated view. Any end user with the appropriate permissions can leverage the visual Dashboard editor and easy-to-use data visualization tools to create and modify dashboards with various charts, gauges, tables, and other graphics without requiring the intervention of an administrator.
DB-004	The Applications should support a method to easily find and use existing views into the database.	Currently Deployed	Created List view filters can be saved for others to use in the same location as the list views created for individual use only. In list views you see only the data that you have access to. You see records that you own or have read or write access to, and records shared with you. List views also include records owned by or shared with users in roles below you in the role hierarchy. You can see only the fields that are visible according to your page layout and field-level security settings.
Export			
DB-005	The proposed solution must support data export in a variety of common file formats, such as, CSV, tab-delimited text, SQL, XLS, DOC, which the State Bar can manipulate for reporting.	Requires Configuration	Salesforce natively supports CSV and report data in .XLS. Any standard user interface page may be viewed in a printable format and/or printed. The link to any Salesforce page may be sent via email using standard "Send Page…" browser functionality. Salesforce Reports may be exported to printed or exported to CSV data or Excel formats
Documentation			

DB-006	The Applications should provide ready access to an up to date Entity Relationship Diagram (ERD) and Data Dictionary by State Bar technical staff from the initiation of design, forward.	Currently Deployed	Schema Builder provides a dynamic environment for viewing and modifying all the objects and relationships in your app. This greatly simplifies the task of designing, implementing, and modifying your data model, or schema. Schema Builder is enabled by default. You can view your existing schema and interactively add new custom objects, custom fields, and relationships, simply by dragging and dropping. Schema Builder automatically implements the changes and saves the layout of your schema any time you move an object. This eliminates the need to click from page to page to find the details of a relationship or to add a new custom field to an object in your schema. Schema Builder provides details like the field values, required fields, and how objects are related by displaying lookup and master-detail relationships. You can view the fields and relationships for both standard and custom objects. Schema Builder lets you add the following to your schema: -Custom objects -Lookup relationships -Master-detail relationships -All custom fields except: Geolocation
DB-007	The Applications must provide tools and capability for State Bar management and technical control of schema and other database implementation as new versions of The Applications are released.	Currently Deployed	Schema Builder provides a dynamic environment for viewing and modifying all the objects and relationships in your app. This greatly simplifies the task of designing, implementing, and modifying your data model, or schema. Schema Builder is enabled by default. Release Notes: Every new release/upgrade includes access to summary level and detailed level Release Notes. For example Spring '17 Release Notes URL: https://releasenotes.docs.salesforce.com/en-us/spring17/release-notes/salesforce_release_notes.htm Automatic Upgrades: One of the beauties of the multitenant Force.com platform is that customers are always operating on the latest version of our service. Everyone enjoys instant, low-maintenance upgrades each time Salesforce releases a new version of the application and platform. That way, the entire community can take advantage of the latest innovations from our product development team. Unlike the time and expense associated with upgrading to a new version of a client/server application, Force.com platform customizations and integrations are preserved through upgrades with minimal—if any—work on the customer's end.
DBMS Platform			
DB-008	The transactional database should be a Microsoft SQL database. (Other database platforms will be considered.)	Currently Deployed	The Force.com platform supports two query languages: Salesforce Object Query Language (SOQL) is a query-only language. While similar to SQL in some ways, it's an object query language that uses relationships, not joins, for a more intuitive navigation of data. Salesforce Object Search Language (SOSL) is a simple language for searching all across all persisted objects.
Replication			
DB-009	The Applications must be capable of replicating to a Microsoft SQL database.	Requires Configuration	There are various data integration vendors (e.g. Informatica) that should be looked at (that provide mapping support from dissimilar schemas). This should be approached as part of data backup and recovery approach.

DB-010	The replication between the production transactional database and the reporting / public access databases should, at a minimum, be performed on a near real-time basis. (This may be asynchronous).	Currently Deployed	The Salesforce instance is a central repository of information that is instantly reportable and viewable to public facing access points once data is saved/stored/updated/etc. in a field that is designated as viewable to the Community (Authenticated) User or (Unauthenticated 'guest') User. Security has been the top priority from day one. We ensure that our customers' data is protected with comprehensive physical security, data encryption, user authentication, and application security as well as the latest standard-setting security practices and certifications, including: - World-class security specifications - SAS 70 Type II, SOX, ISO27001, and third-party vulnerability and SysTrust certifications - Secure point-to-point data replication for data backup: Backup disks for customer data never leave our facilities—no disks ever in transport. It must be noted that there is no separate databases for OLTP vs reporting
DB-011	The database implementation should be capable of journaling.	Currently Deployed	Journaled/checkpoint based replication – Enter journaled files systems and checkpoint based replication. This type of technology (e.g. EMC Recoverpoint) allows not only read/write access to either side of a replicated storage set, but also the ability to recover data at a point in time. This is a system/platform capability and is not an application/implementation specific.
Distribution			
DB-012	The Applications must allow for a distributed database environment supporting distributed production operation with peer fail over of database operations.	Currently Deployed	Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned at an archive data center. Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). Backups are retained for 90 days. Backups never physically leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process. For business continuity purposes, Salesforce supports disaster recovery with a dedicated team and a 4 hour recovery point objective (RPO) and 12 hour recovery time objective (RTO). Salesforce has documented Disaster Recovery plan. The Disaster Recovery plan is tested at least annually. A post mortem documenting the results of the disaster recovery tests can be provided to customers with a signed NDA in place. Additional details on Salesforce's Disaster Recovery can be provided with the execution of an NDA between Salesforce and California State Board of Bar.
Logging			

| DB-013 | The proposed solution must provide self-generated audit reports based on log entries. | Currently Deployed | Event logs are kept for one day (up to 30 days for extra cost). Make sure this complies with client's data retention policy or suggest automated log exports. Access to event logs is controlled be special permission and only users with the given permission can access and download the logs.

In addition to Salesforce's core auditing capabilities, Salesforce offers Event Monitoring as an additional license option. The State Bar can use event monitoring to discover how often and at what times your users are logging in to and out of your organization. This includes insight into what Salesforce applications are being adopted by users, who is logging in and from where, what pages users are viewing, what reports users are running and exporting and other aspects of application usage. This capability helps you discriminate between valid and invalid login requests and also track user login patterns for future reference. For example, depending on your org settings, admins can log in to Salesforce as another user. You can use Login As event type data to review those actions to identify any security breaches or vulnerabilities, and also to inform your users what occurred. Not only can the State Bar now better understand how your apps are being utilized, you can also monitor if users download large amounts of data that might put the State Bar at risk. In addition, the State Bar can also determine if an employee is unnecessarily downloading sensitive customer/citizen information, pinpointing the exact time and location of that event. Event Monitoring is delivered as an API-first feature and there are Salesforce partners with visualization tools available. |
| DB-014 | The proposed solution must rotate and archives activity logs. | Currently Deployed | Salesforce archives events and tasks on a schedule according to certain criteria.

Salesforce archives certain year-old events and tasks every Saturday at approximately 5:00 AM Greenwich Mean Time (GMT). Salesforce archives activities as follows.
Events that ended more than 365 days ago
Closed tasks due more than 365 days ago
Closed tasks created more than 365 days ago, if they have no due date

After Salesforce archives activities, you can view them in exported data and in certain locations in Salesforce Classic. Activities are archived regardless of whether you use Salesforce Classic, Lightning Experience, or Salesforce1. However, although you can view archived activities in exported data and in Salesforce Classic, you can't view them in Lightning Experience or Salesforce1.

Salesforce doesn't delete archived activities, but you can manually delete them. When you create or refresh a sandbox, archived activities aren't copied.

To improve the speed and performance of activity reports, the system will automatically archive older activities to reduce the number of records being searched through in reporting and SOQL queries.

Archive Days increase limits and maximums
Default setting - 365
Maximum limit - 2555
Recommended maximum - 1825 days (5 years) maximum |

| DB-015 | The proposed solution must support export of audit or log data to an external system for archive and analysis (syslog, SIM, etc.). | Currently Deployed | Within Salesforce, the creator and last updater, as well as timestamps, are recorded for every record. Additionally, the Salesforce Platform and Salesforce Applications have a multitude of history tracking and auditing features that provide valuable information about the use of an organization's applications and data, which in turn can be a critical tool in diagnosing potential or real security issues. Auditing features include:

Record Modification Fields - All objects include fields to store the name of the user who created the record and who last modified the record. This provides some basic auditing information.

Login History - You can review a list of successful and failed login attempts to your organization for the past six months within Salesforce. The State Bar can also track the geographic location of the IP addresses of your logins in your personal settings. You can track the geographic location of the login IP addresses for any of your users in the user's detail page. To get more detailed geographic information, such as city and postal code, you can download the login history. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) can vary.

Field History Tracking - You can also enable auditing for individual fields, which will automatically track any changes in the values of selected fields. Although auditing is available for all custom objects, only some standard objects allow field-level auditing.

Setup Audit Trail - Administrators can also view a Setup Audit Trail for the past six months within Salesforce, which logs when modifications are made to your organization's configuration. This trail can be downloaded into Excel or as a csv file.

While the Login History and Setup Audit Trail are available for six months within Salesforce, audit trails can be downloaded and stored locally to meet longer audit log retention requirements.

Detailed application logs can be used for forensics investigations by customers. These logs are stored for 12 months and are available for a fee.
To enable screen reader support, press shortcut ⌘+Option+Z. To learn about keyboard shortcuts, press shortcut ⌘slash. |

DB-016	The proposed solution must protect audit log files from unauthorized alteration from system users and/or by the vendor support staff.	Currently Deployed	Event logs are kept for one day (up to 30 days for extra cost). Make sure this complies with client's data retention policy or suggest automated log exports. Access to event logs is controlled be special permission and only users with the given permission can access and download the logs.
			In addition to Salesforce's core auditing capabilities, Salesforce offers Event Monitoring as an additional license option. The State Bar can use event monitoring to discover how often and at what times your users are logging in to and out of your organization. This includes insight into what Salesforce applications are being adopted by users, who is logging in and from where, what pages users are viewing, what reports users are running and exporting and other aspects of application usage. This capability helps you discriminate between valid and invalid login requests and also track user login patterns for future reference. For example, depending on your org settings, admins can log in to Salesforce as another user. You can use Login As event type data to review those actions to identify any security breaches or vulnerabilities, and also to inform your users what occurred. Not only can the State Bar now better understand how your apps are being utilized, you can also monitor if users download large amounts of data that might put the State Bar at risk. In addition, the State Bar can also determine if an employee is unnecessarily downloading sensitive customer/citizen information, pinpointing the exact time and location of that event. Event Monitoring is delivered as an API-first feature and there are Salesforce partners with visualization tools available.
			Use the SOAP API and REST API resources to retrieve event log files that contain information useful for assessing organizational usage trends and user behavior. Because event log files are accessed through the Force.com SOAP API and REST API, you can integrate log data with your own back-end storage and data marts so that you can correlate data from multiple organizations and across disparate systems easily. When using event monitoring, keep the following in mind:
			• Log data is read-only. You can't insert, update, or delete log data. • Use the EventType field to determine which files were generated for your organization • LogDate tracks usage activity for a 24-hour period, from 12:00 a.m. to 11:59 p.m. UTC time. • An event generates log data in real time. However, log files are generated the day after an event takes place, during nonpeak hours. Therefore, log file data is unavailable for at least one day after an event. • CreatedDate tracks when the log file was generated. • Log files, represented by the EventType field, are only generated if there is at least one event of that type for the day. If no events took place, the file won't be generated for that day • Log files are available based on CreatedDate for the last 30 days when organizations purchase User Event Monitoring or one day for Developer Edition organizations. • All event monitoring logs are exposed to the API through the EventLogFile object, however there is no access through the user interface.
			Event monitoring can be used with 32 different file types: Apex Callout, Apex Execution, Apex SOAP, Apex Trigger, API, Async Report, Bulk API, Change Set Operation, Content Distribution, Content Document Link, Content Transfer, Dashboard, Document Attachment Downloads, Login, Login As, Logout, MDAPI Operation, Multiblock Report, Package Install, Queued Execution, Report, Report Export, REST API, Salesforce1 Adoption (UI Tracking), Sandbox, Sites, Time-Based Workflow, URI, Visualforce,
Disaster Recovery			

ID	Requirement Text	Response Code	Assumptions/Comments
DB-017	The Database architecture must support the industry best practices protocols for disaster recovery, including employing an out of state, third party service provider.	Currently Deployed	Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned to the disaster recovery data center. Disaster recovery tests verify our projected recovery times and the integrity of the customer data.

Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). disks never leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.

The backup retention policy is 90 days (30 days for sandboxes). Deleted / modified data cannot be recovered after 90 days (30 days for sandboxes). If customers want a longer retention, they can use the weekly export feature available in the system. |
| **Load Balancing** | | | |
| DB-018 | The database implementation should provide load balancing (active/active) across the replicated databases. | Currently Deployed | We maintain a pool of servers to handle login traffic for all instances. A handful of servers from many (but not all) instances accept login requests and redirect the session to the user's home instance. This is what happens when you log in via login.salesforce.com.

Customer traffic starts with our external DNS. Once a lookup has successfully returned the IP address for an instance, standard Internet routing directs it to the appropriate datacenter.

Once the traffic enters our network in that datacenter, it is directed to the load balancer pair on which that IP lives. All of our Internet-facing IPs are VIPs configured on an active/standby pair of load balancers. http://highscalability.com/blog/2013/9/23/salesforce-architecture-how-they-handle-13-billion-transacti.html

Thanks to the 24/7 availability of the internet, businesses need networks that are designed to assure high availability (H/A). The two most popular methods adopted by network managers today to achieve this are to use clustering to deal with failover (Active/Passive Mode) and load balancing.

Alternatively, Active/Active mode is employed to provide for database or session replication and to support redundancy. Load balancers can be placed in the network to direct server requests according to server performance and the method of traffic distribution chosen, such as round robin for example. In certain cases, network managers prefer to place load balancers outside the cluster to provide for increased horizontal scalability.

Platform as a service (PaaS) such as Force.com is an application-centric approach that abstracts the concept of servers altogether. PaaS lets developers focus on core application development from day one and to deploy an application with the push of a button. The provider never needs to worry about multitenancy, high availability, load balancing, scalability, system backups, operating system patches and security, and other similar infrastructure-related concerns — all these services are delivered as the "S" in PaaS. |
| **ID** | **Requirement Text** | **Response Code** | **Assumptions/Comments** |
| **Application** | | | |

AV-001	All components of the application should operate 24 hours a day, 7 days a week.	Alternative Proposed	Salesforce has maintained high levels of availability across all Salesforce instances since inception. As the only on-demand vendor to provide daily service-quality data on a public Web site (http://trust.salesforce.com), Salesforce proves that we are the leader in availability. And by making its track record completely transparent, Salesforce proves we are worthy of our customers' trust. To ensure maximum uptime and continuous availability, Salesforce provides the best redundant data protection and most advanced facilities protection available, along with a complete data recovery plan—all without affecting performance. Salesforce uses commercially reasonable efforts to make its on-demand services available to its customers 24/7, except for planned downtime, for which Salesforce gives customers prior notice, and force majeure events. Excellent availability statistics are critical to Salesforce's customers' success and to the success of Salesforce as a company. Live and historical statistics on the Salesforce system performance are publicly published at https://trust.salesforce.com/en/#systemStatus. The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent. Additionally, per the Questions and Answers released on April 4, 2017, the State indicated that SLA requirements can be negotiated with the chosen solution and provider.
AV-002	Downtime due solely to application failure must be less than 0.001% measured annually.	Alternative Proposed	Please refer to our response in requirement AV-001. Additionally, per the Questions and Answers released on April 4, 2017, the State indicated that SLA requirements can be negotiated with the chosen solution and provider.
AV-003	All components of the application should be fully functional within 30 minutes of a failure of a vendor provided DBMS.	Alternative Proposed	Please refer to our response in requirement AV-001. Additionally, per the Questions and Answers released on April 4, 2017, the State indicated that SLA requirements can be negotiated with the chosen solution and provider.
Facilities			
AV-004	In the event that a local State Bar facility becomes unavailable (e.g., natural or man-made disaster), all local applications should be fully functional with complete and current data between State Bar sites within 24 hours of the provisioning of those facilities, allowing State Bar employees to resume full operations	Currently Deployed	This requirement is not applicable to a cloud-based solution. Salesforce is a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the State Bar to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices. Salesforce System Requirements: https://resources.docs.salesforce.com/206/latest/en-us/sfdc/pdf/salesforce_technical_requirements.pdf

| AV-005 | In the event that the data center facility supporting the Application becomes unavailable (e.g., natural or man-made disaster), all local applications should be fully functional with complete and current data between State Bar sites within 24 hours of the provisioning of those data center facilities, allowing State Bar employees to resume full operations | Currently Deployed | Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned to the disaster recovery data center. Disaster recovery tests verify our projected recovery times and the integrity of the customer data.

Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). disks never leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.

The backup retention policy is 90 days (30 days for sandboxes). Deleted / modified data cannot be recovered after 90 days (30 days for sandboxes). If customers want a longer retention, they can use the weekly export feature available in the system. |

| AV-006 | The application should be compatible with the industry best practices for disaster recovery, which includes ability to restore systems from backups and the reapplication of update transactions from available journal files. | Currently Deployed | Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned to the disaster recovery data center. Disaster recovery tests verify our projected recovery times and the integrity of the customer data.

Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). disks never leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.

The backup retention policy is 90 days (30 days for sandboxes). Deleted / modified data cannot be recovered after 90 days (30 days for sandboxes). If customers want a longer retention, they can use the weekly export feature available in the system.

Protection at the application level
Salesforce protects customer data by ensuring that only authorized users can access it. Administrators assign data security rules that determine which data users can access. Sharing models define organization-wide defaults and data access based on a role hierarchy. All data is encrypted in transfer. All access is governed by strict password security policies. All passwords are stored in SHA 256 one-way hash format. Applications are continually monitored for security violation attempts.

Protection at the facilities level
Salesforce security standards are stringent and designed with demanding customers in mind, including the world's most security-conscious financial institutions. Authorized personnel must pass through five levels of biometric scanning to reach the Salesforce system cages. All buildings are completely anonymous, with bullet-resistant exterior walls and embassy-grade concrete posts and planters around the perimeter. All exterior entrances feature silent alarm systems that notify law enforcement in the event of suspicion or intrusion. Data is backed up to disk or disk. These backups provide a second level of physical protection. Neither disks nor disks ever leave the data center.

Protection at the network level
Multilevel security products from leading security vendors and proven security practices ensure network security. To prevent malicious attacks through unmonitored ports, external firewalls allow only http and https traffic on ports 80 and 443, along with ICMP traffic. Switches ensure that the network complies with the RFC 1918 standard, and address translation technologies further enhance network security. IDS sensors protect all network segments. Internal software systems are protected by two-factor authentication, along with the extensive use of technology that controls points of entry. All networks are certified through third-party vulnerability assessment programs.

Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site you'll find:

● Live and historical data on system performance |
| **Notification** | | | |

AV-007	The proposed solution should notify the State Bar of service outages or degradations through e-mail alerts or RSS feeds that the State Bar can integrate into its internal infrastructure monitoring tools or dashboards.	Currently Deployed	Product and Service Notifications are communications from the Salesforce Technology Communications team that are sent to admins of Salesforce orgs via email, to alert them of any changes to features, functionality, or service that may impact their use of Salesforce. These notifications may include actions admins must take in order to prepare for these changes. In addition to that, Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. The status sites provide transparency around service availability and performance for Salesforce products.
AV-008	The proposed solution should provide State Bar user and administrator viewable reporting related to the uptime and performance state of each of its included services.	Currently Deployed	Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site you'll find: ● Live and historical data on system performance ● Up-to-the minute information on planned maintenance ● Phishing, malicious software, and social engineering threats ● Best security practices for your organization ● Information on how we safeguard your data
Hardware			
AV-009	All components of the application should be fully functional within 30 minutes of a server hardware replacement. (Please note that this requirement does not make the vendor responsible for server hardware performance, unless vendor is proposing a hosted solution. However, the Application's design and hardware component architecture should provide for this recovery of operations.)	Alternative Proposed	Please refer to our response in requirement AV-001. Additionally, per the Questions and Answers released on April 4, 2017, the State indicated that SLA requirements can be negotiated with the chosen solution and provider.

AV-010	In the event of a desktop hardware failure, all components of the application should be fully functional within 15 minutes of hardware replacement, allowing State Bar employee to resume full operations. (Please note that this requirement does not make the vendor responsible for server hardware performance. However, the application design and hardware component architecture should provide for this recovery of operations.)	Alternative Proposed	Please refer to our response in requirement AV-001. Additionally, per the Questions and Answers released on April 4, 2017, the State indicated that SLA requirements can be negotiated with the chosen solution and provider.
Maintenance			
AV-011	Backup should not interrupt Application operations.	Currently Deployed	Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). Disks never leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.
AV-012	The maintenance and upgrades should not interrupt the Application's operations for a hosted solution.	Currently Deployed	All upgrades, patches, and other system maintenance are provided as part of the subscription service with no additional cost to the State Bar. In addition, Salesforce releases 3 complimentary upgrades each year, in Winter, Spring, and Summer versions. All Salesforce users are always on the latest version of our platform because everyone gets instant upgrades (typically in an opt-in basis). Each time Salesforce releases a new version of the application and the platform, the entire community can take advantage of the latest innovations from our product development team. Because of our multi-tenant architecture, Salesforce is able to provide all of our customers with a service based on a single version of our application. We are able to upgrade all of our customers at the same time with each release. As a result, we do not have to maintain multiple versions of our application. Each release will be delivered automatically in a transparent manner, and will not break your configurations.

All customizations— schema, code, apps—are specified as metadata that decouples them from the runtime environment and services of the Salesforce Force.com Platform. Upgrades on everything from app servers to UI frameworks can be deployed seamlessly |
| **ID** | **Requirement Text** | **Response Code** | **Assumptions/Comments** |
| **Event Based Interfaces** | | | |

| IN-001 | The Application must be able to produce a transaction record as a web service whenever an update is made to the Application's database. | Currently Deployed | Salesforce enables administrators to track audit history for any database object. Using point and click configuration, administrators can choose which database objects and which fields they want to audit and track and the system automatically tracks the history of data value changes, time of change and user who changed the data. This functionality is supported for both standard and custom data objects. This audit history tracking data is automatically available in all page layouts without any custom coding or interface development. Additionally, the system can track the history of workflow approval processes. Audit history data is viewable in both user interface screens and in Salesforce's reporting and analytics.

Field Audit Trail (Additional Licensing Option) lets you define a policy to retain archived field history data up to ten years, independent of field history tracking. This feature helps you comply with industry regulations related to audit capability and data retention.

Salesforce provides programmatic access to your organization's information using simple, powerful, and secure application programming interfaces.

Apex REST API - Build your own REST API in Apex. This API exposes Apex classes as RESTful Web services. Apex SOAP API - Create custom SOAP Web services in Apex. This API exposes Apex classes as SOAP Web services |
|---|---|---|---|
| IN-002 | The Application must have facilities to push events and properties to other State Bar Applications. | Currently Deployed | Point and click business logic comes in the form of validation rules for validating data input, formula fields, assignment rules for leads and cases, auto-response rules for leads and cases, and workflow rules which automate actions based on required business processes. Each of these forms of business logic is configured through the point-and-click Setup environment. Triggering of a workflow rule can be based on formula based criteria for the record or time dependent actions.

The following actions can be triggered via workflow rules or Process Builder processes:

• Tasks assigned to a user
• Email Alerts to one or more recipients
• Fields updates
• Outbound XML Messages to a designated listener
• Create a record
• Update any related record—not just the record or its parent
• Use a quick action to create a record, update a record, or log a call
• Invoke a process from another process
• Launch a flow
• Post to Chatter
• Submit for approval |
| IN-003 | The Application must have facilities to receive events and properties from other State Bar Applications. | Currently Deployed | Salesforce.com provides a wide set of API and integration points. Different data integration patterns are supported (batch, realtime, near-realtime) as well as different communication patterns (synchrounous, asynchrounous) |

| IN-004 | The Application must be able to hold interface transactions in queue if receiving State Bar Applications are unavailable. | Requires Configuration | A single SOAP message can include up to 100 notifications. Each notification contains the object ID and a reference to the associated sObject data. Note that if the information in the object changes after the notification is queued but before it is sent, only the updated information will be delivered.

If you issue multiple discrete calls, the calls may be batched together into one or more SOAP messages.

Messages will be queued locally. A separate background process performs the actual sending, to preserve message reliability:

If the endpoint is unavailable, messages will stay in the queue until sent successfully, or until they are 24 hours old. After 24 hours, messages are dropped from the queue.

Connecting Salesforce to an existing enterprise application is a common and frequently performed task. Integration options range from native Web Services support (APIs, outbound workflow, etc.) to import/export utilities to middleware integration via packaged connectors to toolkits for Java, .NET, and other open platforms.. Our solution provides the ability to call out to virtually all common APIs, to enable synchronization, push / pull, and mash-ups with external apps/systems. Salesforce itself is based on web-service based APIs that in turn simplify access to Salesforce data from external systems. API-based integration is heavily leveraged by our customers.

The APIs are provided with the Salesforce Force.com platform to build integration interfaces with third party applications or by our integration partners to use in their connectors. Any 3rd party application that accesses your Salesforce instance via the APIs, will be subject to the same security protections that are used in your Salesforce user interface. Therefore, the 3rd party application will need to use a "granted" user in order to access the Salesforce data. These are open APIs (based on industry-standards such as REST and SOAP) that you can use to integrate Salesforce endpoints with external endpoints such as apps or enterprise integration hubs. As an example, you have the Batch and Bulk APIs used in the Data integration patterns or the SOAP and REST APIs used for UI integration patterns.

Integration Options as various Layers of a Solution
Salesforce lets you choose integration methods at different layers to optimally align with business requirements, security policies, and master data management guidelines. Specifically, the State Bar can choose how best to integrate across Security, User Interface, Business Logic and Data Integration layers. For more details on optimal design patterns for integration, see the Whitepaper "Integration Patterns and Practices" at: https://resources.docs.salesforce.com/sfdc/pdf/integration_patterns_and_practices.pdf

Five Paths to Integration Success
Salesforce Force.com provides paths to integration success—all based on our industry-leading Web services API—and an extensive integration partner ecosystem. Integration with Salesforce Force.com means faster, simpler, and less-risky integration that doesn't break during upgrades and delivers a new level of access and agility to your existing IT investments. |
| **Messaging Protocol** | | | |

| IN-005 | Data Transmission to other State Bar Applications should utilize XML technology as the standard format of data transmission, unless otherwise specified. | Requires Configuration | Force.com Canvas enables you to easily integrate a third-party application in Salesforce. Force.com Canvas is a set of tools and JavaScript APIs that you can use to expose an application as a canvas app. This means you can take your new or existing applications and make them available to your users as part of their Salesforce experience.

Instead of redesigning and reintegrating your external applications, you can now use these tools to integrate your technology within Force.com Canvas. Force.com Canvas includes tools that handle:

Authentication - If your application requires authorization, you can implement it by using a signed request or OAuth 2.0.
Context - API support that enables you to retrieve context information about the environment in which the canvas app is running.
Cross-domain XHR - JavaScript support for cross-domain XML HTTP requests back to the Salesforce domain.
Resizing - Methods that support the ability to resize your canvas app.
Events - Events provide a JavaScript-based way to send and receive events between canvas apps. Use events to enable communication between multiple canvas apps on a single page.
Canvas Apps in Visualforce - A Visualforce component that lets you expose your canvas app on a Visualforce page.
Canvas Apps in the Publisher - Lets you add a canvas app as a custom action and expand the publisher to include a canvas app.
Canvas Apps in the Chatter Feed - Lets you expose your canvas apps as feed items.
Canvas in the Salesforce1 mobile app - Makes your canvas apps available in Salesforce1 Mobile |
| IN-006 | Any interfaces between the Applications and other State Bar Applications should be implemented using standard messaging protocols. | Requires Configuration | Please refer to our response in requirement IN-004. |
| IN-007 | The proposed solution must include a recovery and synchronization process (following the failure of the proposed system) for interfaces with external Applications. | Requires Configuration | To maximize availability, the service is delivered using multiple world-class data centers supporting primary and replicated disaster recovery instances, plus a separate production-class lab facility. The infrastructure utilizes carrier-class components designed to support millions of users. Extensive use of high-availability servers and network technologies, and a carrier-neutral network strategy, help to minimize the risk of single points of failure, and provide a highly resilient environment with maximum uptime and performance.

The Salesforce Services are configured to be N+1 redundant at a minimum, where N is the number of components of a given type needed for the service to operate, and +1 is the redundancy. In many cases, Salesforce has more than one piece of redundant equipment for a given function.

Connecting Salesforce to an existing enterprise application is a common and frequently performed task. Integration options range from native Web Services support (APIs, outbound workflow, etc.) to import/export utilities to middleware integration via packaged connectors to toolkits for Java, .NET, and other open platforms. Our solution provides the ability to call out to virtually all common APIs, to enable synchronization, push / pull, and mash-ups with external apps/systems. Salesforce itself is based on web-service based APIs that in turn simplify access to Salesforce data from external systems. API-based integration is heavily leveraged by our customers |
| **Produce/Publish** | | | |

| IN-008 | The Application should employ a standardized, "Publish/Subscribe", approach for Web services (i.e., a way for a Web service, or other entity, to disseminate information to a set of other Web services, without having to have prior knowledge of these other Web Services.) Examples include WS-Notification and WS-Base Notification standards 1.3. | Requires Configuration | Connecting Salesforce to an existing enterprise application is a common and frequently performed task. Integration options range from native Web Services support (APIs, outbound workflow, etc.) to import/export utilities to middleware integration via packaged connectors to toolkits for Java, .NET, and other open platforms. Our solution provides the ability to call out to virtually all common APIs, to enable synchronization, push / pull, and mash-ups with external apps/systems. Salesforce itself is based on web-service based APIs that in turn simplify access to Salesforce data from external systems. API-based integration is heavily leveraged by our customers.

Note: WS-Notification is a Publish/Subscribe notification framework for Web services.

Salesforce provides a WSDL (Web Service Description Language) files. They are called "Enterprise WSDL" and "Partner WSDL". A WSDL is an XML-document which contains a standardized description on how to communicate using a web service (the Salesforce API is exposed as a web service). The WSDL is used by developers to aid in the creation of Salesforce integration pieces. A typical process involves using the Development Environment (eg, Eclipse for Java, or Visual Studio for .Net) to consume the WSDL, and generate classes which are then referenced in the integration.

The primary differences between the two WSDL that we provide are:

Enterprise WSDL:
a) The Enterprise WSDL is strongly typed.
b) The Enterprise WSDL is tied (bound) to a specific configuration of Salesforce (ie. a specific organization's Salesforce configuration).
c) The Enterprise WSDL changes if modifications (e.g custom fields or custom objects) are made to an organization's Salesforce configuration.

For the reasons outlined above, the Enterprise WSDL is intended primarily for Customers.

Partner WSDL:
a) The Partner WSDL is loosely typed.
b) The Partner WSDL can be used to reflect against/interrogate any configuration of Salesforce (ie. any organization's Salesforce configuration).
c) The Partner WSDL is static, and hence does not change if modifications are made to an organization's Salesforce configuration. |
| **Publication** | | | |

| IN-009 | The Applications should be able to provide a generic Notify based Web Service. | Currently Deployed | Outbound messaging allows you to specify that changes to fields within Salesforce can cause messages with field values to be sent to designated external servers.

Outbound messaging is part of the workflow rule functionality in Salesforce. Workflow rules watch for specific kinds of field changes and trigger automatic Salesforce actions, such as sending email alerts, creating task records, or sending an outbound message.

Outbound messaging uses the notifications() call to send SOAP messages over HTTP(S) to a designated endpoint when triggered by a workflow rule.

A single SOAP message can include up to 100 notifications. Each notification contains the object ID and a reference to the associated sObject data. Note that if the information in the object changes after the notification is queued but before it is sent, only the updated information will be delivered.

If you issue multiple discrete calls, the calls may be batched together into one or more SOAP messages.

Messages will be queued locally. A separate background process performs the actual sending, to preserve message reliability:

If the endpoint is unavailable, messages will stay in the queue until sent successfully, or until they are 24 hours old. After 24 hours, messages are dropped from the queue.
If a message cannot be delivered, the interval between retries increases exponentially, up to a maximum of two hours between retries. |
|---|---|---|---|
| IN-010 | The Applications should be able to publish notifications to a Web Service. | Currently Deployed | A single SOAP message can include up to 100 notifications. Each notification contains the object ID and a reference to the associated sObject data. Note that if the information in the object changes after the notification is queued but before it is sent, only the updated information will be delivered.

If you issue multiple discrete calls, the calls may be batched together into one or more SOAP messages.

Messages will be queued locally. A separate background process performs the actual sending, to preserve message reliability:

If the endpoint is unavailable, messages will stay in the queue until sent successfully, or until they are 24 hours old. After 24 hours, messages are dropped from the queue.

Making Authenticated Web Service Callouts Using Two-Way SSL
Web Service Callouts is a powerful feature of the Force.com platform that allows you to connect to other web services and exchange data from inside Apex code or triggers. You can use this to notify other services of changes to data in your environment (org), or to retrieve data "on the fly" from a remote system and show it on a Visualforce page.
Callouts can be secured using SSL, as well as with two-way SSL, in which both the client and the server present certificates to prove their identity to each other. This article explains how you can use two-way SSL as a strong authentication method when you make callouts from Force.com to other services. |
| **Request / Response** | | | |
| IN-011 | The Application must be able to produce requests and receive responses in request/response service interaction profile. | Requires Configuration | Chatter REST API uses HTTP methods to send and receive JSON and XML content, so it is very simple to build client applications using the tool or the language of your choice. |

IN-012	The Application must be able to receive requests and produce responses in request/response service interaction profile.	Requires Configuration	Chatter REST API uses HTTP methods to send and receive JSON and XML content, so it is very simple to build client applications using the tool or the language of your choice.
Standards			
IN-013	System interoperability should adhere to the WS-I Basic Profile 1.2 or higher standard.	Requires Customization	Salesforce.com SOAP API is WS-I 1.1 compliant. If WS-I 1.2 specific features are required, that could be achieved through custom development. NOTE: Basically, WS-I Basic Profile provides the guidance on how to use together specifications like SOAP, WSDL and UDDI to develop interoperable web services. It is important because otherwise you will limit your target audience. A web service is meant to be connected to other components and having each component be WS-I compliant will make the job easier no matter the platforms, tools, applications or programming languages.
IN-014	The Application must be able to produce and to consume data files via FTP.	Requires Configuration	FTP/SFTP is supported via 3rd party tools such as dataloader.io. CSV files can be imported/exported to/from SFDC from/to FTP and SFTP targets/destinations. Salesforce Data Loader (dataloader.io) - Data Loader is a free, client application for the bulk import or export of data. Use it to insert, update, delete or export Salesforce records. Using dataloader.io, you can import and export data directly from Box, DropBox, FTP and SFTP repositories quickly and easily. With dataloader.io you can export your data in CSV files directly into an FTP server. All you have to do is add a destination folder in your FTP server in the final step of the process. The REST-based Bulk API was developed specifically to simplify the process of uploading large amounts of data. It is optimized for inserting, updating, upserting, and deleting large numbers of records asynchronously by submitting them in batches to Force.com, to be processed in the background. Import/Export Utilities The Salesforce Platform includes the following import/export options for data: • Data Import Wizard - An in-browser wizard that imports data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects. • Salesforce Data Loader (dataloader.io)- Data Loader is a free, client application for the bulk import or export of data. Use it to insert, update, delete or export Salesforce records. • Direct Export - Data can be exported directly into CSV (comma separated values) file, or Excel files with a button click. This can be done from either a standard or custom list view, or from a report. This is the most common method utilized by end users. • Excel Connector - Salesforce provide an Excel Connector to push and pull data from Excel to Salesforce and vice versa. • Salesforce API - Data can be exported to and from the system through our API at any time or via a number of built in features. • Partner Tools - There are also many pre-integrated partner tools, some of which you may already own that may be leveraged. Examples of these include, but are not limited to, Informatica, Pervasive, CastIron, Boomi, etc. We also offer a weekly export service (WES) for those customers requiring a local backup copy of their data or a
Subscription			

IN-015	Provide for a run time mechanism or Subscription Manager where a requestor such as another State Bar Application can query other Applications and data structures.	Currently Deployed	Salesforce allows the State Bar to have multiple applications within a single org. Access permission are defined by a user's Profile and Role. The user Profile controls access permissions to defined standard and custom objects, as well as all functional capabilities in the application. The user Role, as well as the placement of that role in the organization-defined Role Hierarchy, controls user access to specific data records. For example, a user's Profile may indicate that a user has read, create, edit and delete permissions to the Contact object (table) in the database. However, the user's Role will determine which actual contact records the user will be able to access, which may be a subset of all defined contact records in the database. Salesforce.com provides a full set of APIs (both SOAP and REST based) which can be used to query and manipulate data stored in the Salesforce organization. Access to data structures and actual data records is controlled by granular access policies
IN-016	Provide for a run time mechanism or Subscription Manager where a requestor Application can subscribe to obtain notifications and related data from the other State Bar Applications and data structures.	Requires Configuration	The Force.com Streaming API lets you expose a near real-time stream of data from the Force.com platform. Streaming API delivers events that are either tied to changes in Salesforce or based on custom payloads. Administrators can create topics, to which applications can subscribe, receiving asynchronous notifications via the Bayeux Protocol. Streaming data made simple, secure, and scalable. In addition to Streaming API, Salesforce.com also provides an outbound messaging mechanism which can be used to send outbound notifications to external systems using the SOAP protocol
IN-017	Provide for a run time mechanism or Subscription Manager where a requestor such as another Application can manipulate (change filters on) data obtained from the State Bar Applications and data structures.	Requires Configuration	Please refer to our response in requirement IN-015.
Topic Hierarchy			
IN-018	Should provide the topic hierarchy, message schemas and other notification metadata. (ex. XML Topic Namespace documents using the WS-Topics 1.3 or higher standards.)		Streaming API is based on the Bayeux protocol and CometD. These protcols define standard message syntax using the JSON format. Salesforce Outbound Messaging is SOAP based. A SOAP WSDL is available which defines the messaging format and the communication patterns
eSignature			

ID	Requirement Text	Response Code	Assumptions/Comments
IN-019	The Application should be able to integrate with one of the market leader eSignature platforms.	Currently Deployed	Docusign and other eSignature solutions do integrate to some level with Salesforce. The Salesforce AppExchange (http://appexchange.salesforce.com/home) is a directory of over 3,200 pre-built enterprise cloud computing applications that are integrated with Salesforce solutions and developed on the Salesforce Force.com platform by third parties. The AppExchange is the World's Leading Enterprise App Marketplace and [Insert Customer]'s one-stop shop for cloud computing applications and services. Applications that support electronic signature, payment processing, surveys, compliance, project management, and planning for example can easily be integrated. With just a mouse and a Salesforce Force.com account, [Insert Customer] can extend their initial investment and easily find, test drive, and install hundreds of pre-integrated applications from the Salesforce partner community. Through applications available in the Salesforce AppExchange, Salesforce supports electronic signature solutions. For example, Docusign (https://appexchange.salesforce.com/listingDetail?listingId=a0N30000001taX4EAI) quickly pulls in data from Salesforce and allows signing documents directly in Salesforce, or sending them out for signature from Salesforce. Completed documents are then returned to Salesforce and data is automatically updated to your Salesforce records providing a completely seamless experience. The solution works with the Salesforce1 Mobile application, enabling users to send and sign documents from mobile devices.

Disclaimer: Salesforce is an innovative cloud services provider with constantly evolving technology. We have made a good faith effort to provide you with responses to

ID	Requirement Text	Response Code	Assumptions/Comments
Network			
ENV-001	The Application must efficiently operate using network core with Cisco switches with front-end connectivity between the two State Bar locations (Los Angeles and San Francisco) using Cisco routers.	Not Proposed	This requirement is not applicable to a cloud-based solution.
ENV-002	The Application must efficiently operate using Internet access via Cisco routers.	Not Proposed	This requirement is not applicable to a cloud-based solution.
ENV-003	The Application must efficiently operate using Internet access employing Checkpoint Firewall and F5 Web Application Firewall (WAF).	Not Proposed	This requirement is not applicable to a cloud-based solution. Salesforce is a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the State Bar to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.
IVR			
ENV-004	The Application must efficiently operate with Cisco Unified Communications Suite (Unity IVR).	Not Proposed	This requirement is not applicable to a cloud-based solution.
Backup			

ENV-005	The proposed solution must include a built-in data backup capability.	Currently Deployed	Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned at an archive data center. Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). Backups are retained for 90 days. Backups never physically leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process. For business continuity purposes, Salesforce supports disaster recovery with a dedicated team and a 4 hour recovery point objective (RPO) and 12 hour recovery time objective (RTO). Salesforce has documented Disaster Recovery plan. The Disaster Recovery plan is tested at least annually. A post mortem documenting the results of the disaster recovery tests can be provided to customers with a signed NDA in place. Additional details on Salesforce's Disaster Recovery can be provided with the execution of an NDA between Salesforce and the State Bar.
ENV-006	The proposed solution must include utilities enabling independent State Bar backup of proposed system data as an alternative to vendor backup.	Currently Deployed	Use the following backup and recovery methods: **Export Backup Data from Salesforce** - Your Salesforce org can generate backup files of your data on a weekly or monthly basis depending on your edition. You can export all your org's data into a set of comma-separated values (CSV) files. https://help.salesforce.com/articleView?id=admin_exportdata.htm&type=0 **Data Loader** - You can use the Data Loader export wizard to extract data from any Salesforce object. When you export, you can choose to include (Export All) or exclude (Export) soft-deleted records. https://help.salesforce.com/articleView?id=exporting_data.htm&type=0 **Report Export** - Build a new report using the Report Builder, a drag-and-drop tool for accessing your data quickly and comprehensively. Use it to set up new reports and edit existing ones. You can then export the report. To work with report data in a dedicated tool, such as a spreadsheet, export report data as a Microsoft Excel ® (.xls) or comma-separated values (.csv) file. Building a Report - https://help.salesforce.com/articleView?id=reports_builder_editing.htm&type=0&language=en_US Exporting from a Report - https://help.salesforce.com/articleView?id=reports_export.htm&type=0
ENV-007	The proposed solution must support backup of user-specified files.	Currently Deployed	Please refer to our response in requirement ENV-006.

ENV-008	The proposed solution must be available for use (e.g., inquiry and update) during backup without affecting backup integrity.	Currently Deployed	All upgrades, patches, and other system maintenance are provided as part of the subscription service with no additional cost to the State Bar. In addition, Salesforce releases 3 complimentary upgrades each year, in Winter, Spring, and Summer versions. All Salesforce users are always on the latest version of our platform because everyone gets instant upgrades (typically in an opt-in basis). Each time Salesforce releases a new version of the application and the platform, the entire community can take advantage of the latest innovations from our product development team. Because of our multi-tenant architecture, Salesforce is able to provide all of our customers with a service based on a single version of our application. We are able to upgrade all of our customers at the same time with each release. As a result, we do not have to maintain multiple versions of our application. Each release will be delivered automatically in a transparent manner, and will not break your configurations. Export Backup Using the Export Backup from Salesforce option - You can generate backup files manually once every 7 days (for weekly export) or 29 days (for monthly export). You can schedule backup files to generate automatically at weekly or monthly intervals. Heavy traffic can delay an export delivery. For example, assume that you schedule a weekly export to run until the end of the month, beginning April 1. The first export request enters the queue, but due to heavy traffic, the export isn't delivered until April 8. On April 7, when your second export request is scheduled to be processed, the first request is still in the queue. So, the second request isn't processed until April 14. There are no such restrictions using the Data Loader or Report Export options.
ENV-009	The proposed solution must support unattended backup including complete audit and verification of creation of a readable and complete backup.	Currently Deployed	After every import or export, Data Loader generates two CSV output files that contain the results of the operation. One file name starts with "success," while the other starts with "error." During every export, Data Loader saves the extracted data to a CSV file that you specify in the wizard. Data Loader has a built-in CSV file viewer with which you can open and view these files.
System Environments			

| ENV-010 | The proposed solution must include separate environments for configuration/development, QA testing, training, staging and production in alignment with approved deployment and production support approaches. | Currently Deployed | Salesforce offers both a Production environment and 4 different types of Sandbox environments. This gives you the ability to create multiple copies of your organization in separate environments for a variety of purposes, such as testing and training, without compromising the data and applications in your Salesforce production organization. The usage of the various Salesforce Sandbox types during an implementation varies, but below will provide you with a description and common use of each type of environment:

Developer Sandbox
Developer sandboxes are designed for a single developer and intended for coding and testing in an isolated environment. These environments include a copy of your production organization's configuration (metadata). Developer sandboxes have a storage limit to 200 MB of data and 200 MB of files, which is enough for many development and testing tasks. You can refresh a Developer sandbox once per day.

Developer Pro Sandbox
Developer Pro sandboxes are intended for coding and testing in an isolated environment. These environments include a copy of your production organization's configuration (metadata). They have a larger storage limit than Developer sandboxes, up to 1 GB of data and 1 GB of files. The larger limit allows for more robust test data sets and enables this environment to handle more development and quality assurance tasks. You can refresh a Developer Pro sandbox once per day.

Partial Copy Sandbox
Partial Copy sandbox environments include all of your organization's configuration (metadata) and a subset of your production data that you define by using a sandbox template. Use Partial Copy sandboxes for virtually any development, testing, or training purpose. The only tasks for which they aren't well-suited are full performance and load testing.

Additionally, as defined by your sandbox template, Partial Copy sandboxes can include your organization's standard and custom object records, documents, and attachments up to 5 GB of data and 5 GB of files and a maximum of 10,000 records per selected object. You can refresh a Partial Data sandbox every 5 days.

Full Sandbox
Full sandboxes are intended to be used as testing environments. Only Full sandboxes support performance testing, load testing, and staging. Full Sandbox environments are a replica of your production organization, including all data—for example, object records and attachments—and metadata. You can refresh a Full sandbox every 29 days. |
| ENV-011 | The proposed solution must include automated load testing tools. | Currently Deployed | Load testing is used to gauge performance under expected conditions with varying loads (i.e., increasing numbers of users or transactions) and configurations.. Performance and Load testing on our entire platform can be found on Trust.Salesforce.com which highlights daily transaction counts and average daily transaction times.

https://status.salesforce.com/performance |
| ENV-012 | The solution must be compatible with McAfee version 8.8 and higher anti-virus software | Requires Configuration | This does not apply for cloud based solutions, where most functionality is contained in browser. https://kb.mcafee.com/resources/sites/MCAFEE/content/live/PRODUCT_DOCUMENTATION/23000/PD23912/en_US/MCIM_Salesforce_CC_Guide.pdf |
| **Office Automation** | | | |

ID	Requirement Text	Response Code	Assumptions/Comments
ENV-013	The proposed solution must support creating and merging documents using case tracking data and Microsoft Word 2010 and higher.	Currently Deployed	A case hierarchy shows you cases that are associated with one another via the Parent Case field. When a case is associated with a parent case it signifies a relationship between cases. The relationship can be a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve. In the case hierarchy, cases are indented to show that they are related to the parent case above them.
ENV-014	The proposed solution must be able to integrate with Microsoft Office suite 2010 and higher.	Requires Configuration	May need to discuss how to handle MS Office 2010 if it's leveraging TLS 1.0 still. Salesforce is disabling TLS 1.0 encryption protocol on July 2017 in order to align with industry best practices for security and data integrity (see below for details and link). Salesforce System Requirements Link: https://resources.docs.salesforce.com/206/latest/en-us/sfdc/pdf/salesforce_technical_requirements.pdf

Lightning for Outlook System Requirements: https://help.salesforce.com/articleView?id=app_for_outlook_system_requirements.htm&type=0&language=en_US&release=206.15 Note: To avoid service disruption, all **Salesforce for Outlook** users must be working on version 3.0.0 or later by July 2017. Make sure that your sales teams upgrade as soon as possible to work through any installation issues before July.

When Salesforce disables TLS 1.0 encryption protocol on July 2017, Salesforce for Outlook v2.9.3 and earlier no longer function. Reps working from those versions can't sync their Outlook items to Salesforce, nor can they work with their Salesforce records from the side panel. In addition to upgrading reps, make sure that they meet all Salesforce for Outlook requirements for TLS 1.1 and 1.2 compatibility. If you're not sure which Salesforce for Outlook versions your reps.

Salesforce is requiring an upgrade to TLS 1.1 or higher by July 22, 2017 in order to align with industry best practices for security and data integrity. On that date we will disable TLS 1.0. Action is required prior to this date to prevent any disruption to your production instance. This article contains all of the information currently available on Salesforce's disablement of the TLS 1.0 encryption protocol. This article will be updated as new information becomes available. Please check back often for guidance on preparing for TLS 1.0 disablement.

https://help.salesforce.com/articleView?id=Salesforce-disabling-TLS-1-0&type=1 |
| ID | Requirement Text | Response Code | Assumptions/Comments |
| **Server** | | | |
| OP-001 | The application should support Windows Server 2012 R2. | Not Proposed | This requirement is not applicable to a cloud-based solution.

Salesforce is a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the State Bar to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.

Salesforce System Requirements: https://resources.docs.salesforce.com/206/latest/en-us/sfdc/pdf/salesforce_technical_requirements.pdf |
OP-002	Windows servers should be managed under VMWare ESX version 5.5 or higher.	Not Proposed	The Salesforce solution is not hosted on a virtual environment and does not rely on virtualization.
ID	Requirement Text	Response Code	Assumptions/Comments
Component Architecture			

AR-001	All proposed applications should be based on n-tiered architectures.	Currently Deployed	Four tier describes the model Salesforce uses most accurately; each tier can be individually tweaked or even replaced without necessarily needing to alter the other tiers, which is a requirement to be classified as a four tier system. The model can have fields added, for example, without altering the other three layers. Similarly, a new database trigger can be added to the business logic layer without necessarily having to change the model, page controllers, or pages. The four tier model is important to note, because it is possible to interact with just certain layers. For example, you can truncate the model's data, or mass update a picklist value, without interacting directly with the business logic layer. By using the API, you can bypass the controller logic and view without bypassing the business logic or model. And, of course, you can build an application that treats Salesforce as one layer of its own two or three layer architecture.
Component Interaction			
AR-002	The application must be able to manage printing through the Windows operating system.	Currently Deployed	Any standard user interface page may be viewed in a printable format and/or printed. The link to any Salesforce page may be sent via email using standard "Send Page…" browser functionality. Salesforce Reports may be exported to printed or exported to CSV data or Excel formats. We do not provide software that must be written to different hardware, operating system and database platforms, or that depends upon a customer's unique systems environment. Rather, we have optimized our service to run on a specific database and operating system using the tools and platforms best suited to serve our customers. Performance, functional depth and the usability of our service drive our technology decisions and product direction.
AR-003	The application must effectively operate in a network environment featuring address translation.	Not Proposed	This requirement is not applicable to a cloud-based solution.
AR-004	The application must effectively operate in an environment featuring load balanced web, application, and database servers.	Currently Deployed	All aspects of the Salesforce system are configured in an N+1 redundant configuration, where N is the number of components of a given type needed for the service to operate, and +1 is the redundancy. In many cases, Salesforce has more than one piece of redundant equipment for a given function. The infrastructure utilizes carrier-class components designed to support millions of users. Extensive use of high availability servers and network technologies, and a carrier-neutral network strategy, help to minimize the risk of single points of failure, and provide a highly resilient environment with maximum uptime and performance.
AR-005	The application should be compatible with the network infrastructure as described in the Environment section of this document	Not Proposed	This requirement is not applicable to a cloud-based solution. Salesforce is a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the State Bar to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.

AR-006	The application must effectively operate in conjunction with the State Bar current anti-virus software.	Currently Deployed	Salesforce runs antivirus software on the production systems that store, transmit or process customer information. The Anti-virus scans host filesystems (not customer data). The antivirus software checks for virus definition updates daily. Other controls are also used to address malware such as hardening the Operating System of our servers, firewall configuration to ensure only required ports are open and all others denied, and use of intrusion detection systems. Access to these systems is restricted to authorized personnel and all these systems, as well as the host platforms, are monitored in real time through a security monitoring system. The application only accepts http and https traffic, but Salesforce does not restrict the file types users can upload. Salesforce does not modify or clean any customer data; the system stores the information provided in an encoded format within the database. It is recommended that customers run updated antivirus and antimalware solutions to help mitigate these threats. The production system receives inbound mail as part of the workflow functionality, but this does not pose any threat to our network, application, or users. No code in the email can be executed or transferred, eliminating the malicious software risk. Email sent from the Salesforce system is not currently scanned for viruses.
Documentation			
AR-007	The application must provide ready access to an up-to-date and accurate description of the enterprise (statewide) application architecture from the initiation of design, forward, including: application (including 3rd party) components, component distribution, component function, licensing, and dependencies on other components.	Requires Configuration	Schema Builder provides a dynamic environment for viewing and modifying all the objects and relationships in your app. This greatly simplifies the task of designing, implementing, and modifying your data model, or schema. Schema Builder is enabled by default. You can view your existing schema and interactively add new custom objects, custom fields, and relationships, simply by dragging and dropping. Schema Builder automatically implements the changes and saves the layout of your schema any time you move an object. This eliminates the need to click from page to page to find the details of a relationship or to add a new custom field to an object in your schema. Schema Builder provides details like the field values, required fields, and how objects are related by displaying lookup and master-detail relationships. You can view the fields and relationships for both standard and custom objects. Schema Builder lets you add the following to your schema: Custom objects Lookup relationships Master-detail relationships All custom fields except: Geolocation The system overview page shows usage data and limits for your organization, and displays messages when you reach 95% of your limit (75% of portal roles). The system overview page displays usage for: Schema API usage Business logic User interface Most used licenses Portal roles

| AR-008 | The application should provide ready access to an up to date and accurate description of the application network architecture from the initiation of design, forward. | Currently Deployed | Please refer to our response in requirement AR-007.

In addition, this solution includes the use of Salesforce Communities. Communities are a great way to share information and collaborate with people outside your organization who are key to your business processes, such as customers or partners. Use easy point-and-click branding tools with Lightning templates or go with the Visualforce to create branded collaboration spaces. You can create multiple communities within your organization for different purposes.

Communities can be based on standard Salesforce functionality and tabs, or on one of our preconfigured templates. Communities can be used to share a subset of features and data from your internal Salesforce org. Communities can also be customized to use your organization branding.

Setup and Manage Communities: https://resources.docs.salesforce.com/206/latest/en-us/sfdc/pdf/communities.pdf

Using Templates to Build Communities: https://resources.docs.salesforce.com/206/latest/en-us/sfdc/pdf/communities.pdf |

ID	Requirement Text	Response Code	Assumptions/Comments
AR-009	The application should provide ready access to an up-to-date and accurate description of the enterprise (statewide) hardware architecture from the initiation of design efforts, forward.	Currently Deployed	Our proposed SaaS solution is built on the Salesforce Platform and includes all needed infrastructure, which is fully hosted, managed, and maintained by Salesforce. Salesforce only requires a computer that can run a web browser and an Internet connection or a mobile device. No other software or hardware is required. Salesforce applications are delivered on-demand over the Internet, so the State Bar will not need to worry about licensing software or setting up and managing hardware platforms. Salesforce Force.com is a modern Platform as a Service (PaaS) that's built for cloud computing, with multitenancy inherent in its design. To meet the high demands of its large user population, Force.com's foundation is a metadata-driven software architecture that enables multi-tenant applications. Force.com combines several different persistence technologies, including a custom-designed relational database schema, which are innately designed for clouds and multitenancy—no virtualization required. Force.com's core technology uses a runtime engine that materializes all application data from metadata—data about the data itself. In Force.com's well-defined metadata-driven architecture, there is a clear separation of the compiled runtime database engine (kernel), tenant data, and the metadata that describes each application. These distinct boundaries make it possible to independently update the system kernel and tenant-specific applications and schemas, with virtually no risk of one affecting the others. Every logical database object that Force.com exposes is internally managed using metadata. Objects, (tables in traditional relational database parlance), fields, stored procedures, and database triggers are all abstract constructs that exist merely as metadata in Force.com's Universal Data Dictionary (UDD). For example, when you define a new application object or write some procedural code, Force.com does not create an actual table in a database or compile any code. Instead, Force.com simply stores metadata that the system's engine can use to generate the virtual application components at runtime. When you need to modify or customize something about the application schema, like modify an existing field in an object, all that's required is a simple non-blocking update to the corresponding metadata. Because metadata is a key ingredient of Force.com applications, the system's runtime engine must optimize access to metadata; otherwise, frequent metadata access would prevent the service from scaling. With this potential bottleneck in mind, Force.com uses massive and sophisticated metadata caches to maintain the most recently used metadata in memory, avoid performance-sapping disk I/O and code recompilations, and improve application response times. The multitenant architecture and secure logical controls address separation of Customer Data. The Salesforce infrastructure is divided into a modular architecture based on "instances". Each instance is capable of supporting several thousand customers in a secure and efficient manner. Salesforce uses the instance architecture to continue to scale and meet the demands of our customers. There are appropriate controls in place designed to prevent any given customer's Salesforce instance from being compromised. This functionality has been designed and undergoes robust testing through an on-going process by both Salesforce and its customers.
ID	**Requirement Text**	**Response Code**	**Assumptions/Comments**
Initial Capacity			

PF-001	Initially, the application must be able to maintain data and documents for at least 500,000 cases	Currently Deployed	Salesforce provides extensive storage capabilities. Storage is divided into two categories: file storage and data storage. File storage includes files in attachments, the Documents tab, the Files tab, the File field, Salesforce CRM Content, Chatter (including user photos), and Site.com assets. Data storage includes the following entities/records stored within the Salesforce application: Accounts, Article types, Article type translations, Campaigns, Campaign Members, Cases, Case Teams, Contacts, Contracts, Custom objects, Email messages, Events, Forecast items, Google docs, Ideas, Leads, Notes, Opportunities, Opportunity Splits, Orders, Quotes, Quote Template Rich Text Data, Solutions, Tags: Tag applications, Tags: Unique tags, and Tasks. For file storage, Unlimited Edition is allocated a per-user limit multiplied by the number of users in the organization plus an additional per-organization allocation. For example, an Unlimited Edition organization with 600 users receives 1,211 GB of file storage, or 2 GB per user multiplied by 600 users plus an additional 11 GB. For data storage, Unlimited Edition is allocated either 1 GB or a per-user limit, whichever is greater. For example, an Unlimited Edition organization with 10 users receives 1 GB because 10 users multiplied by 20 MB per user is 200 MB, which is less than the 1 GB minimum. Additional storage can be purchased, or files can be exported and archived outside of Salesforce, thus freeing up file storage space. For additional information, visit: https://help.salesforce.com/HTViewHelpDoc?id=limits_storage_allocation.htm&language=en_US
PF-002	Initially, the application must be able to maintain data and documents for at least 300,000 members	Currently Deployed	Please refer to our response in requirement PF-001.
PF-003	Initially, the application should be capable of accommodating a baseline of 300 concurrent users	Currently Deployed	Please refer to our response in requirement PF-001.
Annual / Perpetual Storage Increase			
PF-004	Annually, the application must, scale to maintain data and all documents of record for an additional 15,000 cases.	Currently Deployed	Please refer to our response in requirement PF-001.
PF-005	Annually, the application must, scale to maintain data and all documents of record for an additional 10,000 members	Currently Deployed	Please refer to our response in requirement PF-001.
Scalability			
PF-006	The application should be capable of accommodating a user base growth of up to 15%	Currently Deployed	Multi-tenancy gives applications elasticity. Salesforce applications can automatically scale from one to tens of thousands of users. Processing more than 4 billion transactions each day, Salesforce is used for large-scale deployments. External users are supported via Salesforce Communities products. Limits for Communities are 7 million users for Customer Communities.
State Bar Wide System Performance			

PF-007	A user must be able to review and process 1 filing in 1 minute. This process includes receipt, review, recording on the docket, and notification of the filing. This benchmark is for a filing of 1 document in a case with a single respondent.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-008	A user should be able to find, select, and submit to print a standardized report in less than 30 seconds.	Currently Deployed	Salesforce.com provides out-of-the-box reporting capabilities. Reports can be rendered in multiple formats. Salesforce.com offers a Printable View of the report which can be used to send reports directly to a printer
PF-009	A user should be able to log into the application and access its functions in 5 seconds or less.	Currently Deployed	Salesforce.com is a cloud-based solution that requires users to log in over the web. The login process is carried out by dedicated servers which isolates the login process itself from transactional processing boosting the performance of the login operation (few seconds). SSO login involves a SAML handshake process which is typically short and depends solely on the SSO identity provider. Typical SSO configuration with AD using ADFS takes only few seconds to authenticate users and land them on the home page where thay can start interacting with the system
PF-010	The application must be able to accept 4 filings (4 pages or less) in 1 minute.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-011	The applications should allow a user to initiate a case in less than 1 minute.	Currently Deployed	Cases are treated as a first-class citizen in Salesforce.com. Initiating a new case takes only a click allowing users to quickly fill in case details even while serving clients on the phone or a chat room
PF-012	Upon inquiry, a user must be able to obtain a candidate result list of high probability matches in 2 seconds.	Currently Deployed	Salesforce.com provides out-of-the-box search capabilities including free text search. Data stored in SFDC are continously indexed for best search performance. Salesforce.com also provides custom indexing capabilities to boost performance when searching on non-standard search fields. In addition, SFDC provides a structured search language (SOSL) for building custom search pages
PF-013	A user must be able to retrieve the document file for any case in his/her assigned case load in 3 seconds. For this benchmark, this is the time required to open the document after it is selected.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-014	A user must be able to retrieve and display a selected page of an open document in 1 second. For this benchmark, this is the time required to open the page after it is selected.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.

PF-015	A user must be able to retrieve the document file for any case of up to 100 pages in 15 seconds. For this benchmark, this is the time required to open the document after it is selected.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-016	A user must be able to retrieve and display adjacent pages of an open document in 1 second.	Currently Deployed	Console, Document Preview functionality
State Bar Court System System Performance			
PF-017	A clerk should be able to scan, index, and upload a 4 page court filing in 1 minute.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-018	A judge supported by a single clerk must be able to conduct 12 status conferences per 1 hour session including searching for future calendar dates and scheduling future events.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-019	Parties to a case must be able to receive a paper copy or electronic copy of the court decisions and documents from a hearing, immediately after the hearing.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-020	During a court session, a judge must be able to retrieve and display a selected page of an open document in 1 second. For this benchmark, this is the time required to open the page after it is selected.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.

ID	Requirement Text	Response Code	Assumptions/Comments
PF-021	During a court session, a judge must be able to retrieve the document file for a case (scheduled to be heard in that session) in 3 seconds. For this benchmark, this is the time required to open the document after it is selected.	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-022	During a court session, a judge or clerk must be able to identify an available date, time, and location for a new court event within 1 second. For this benchmark, the application must show available time slots for the date specified by the judge (e.g., When the user invokes a search for available time slots for a specific judge and date, the application responds with available time slots within 1 second)	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
PF-023	During a court session, a judge or clerk must be able to schedule a court event for a selected date, time, and location within 10 seconds. For this benchmark, the clerk or judge must be able to select an available time slot (conformant to time standards by case type), schedule an event, schedule the case parties who must attend this event, and send notifications to these parties	Currently Deployed	The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
ID	**Requirement Text**	**Response Code**	**Assumptions/Comments**
Browser-based			

CL-001	Application functionality must be provided by a browser-based user interface.	Currently Deployed	Based on your requirements, we are proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the State Bar to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.
CL-002	Browser-enabled interfaces must support Internet Explorer 11 and higher.	Currently Deployed	Salesforce Classic is supported with Microsoft® Internet Explorer® version 9, 10, and 11; however, Internet Explorer 11 isn't supported for the Developer Console. Support for Internet Explorer 11 to access Lightning Experience is retiring beginning in Summer '16.. Internet Explorer 11 isn't supported for Lightning Console Apps or the Developer Console. The State Bar can continue to use IE11 to access Lightning Experience until December 16, 2017. This change doesn't impact Salesforce Classic or users of orgs with Communities. (additional info https://help.salesforce.com/articleView?id=getstart_browser_overview.htm&type=0&language=en_US&release=206 .13)
CL-003	Public facing portals must support all commonly used browsers, such as Google Chrome, Mozilla Firefox, etc.	Currently Deployed	Please refer to our response in requirement CL-002.
Screen Based Redaction			
CL-004	The proposed solution must support redaction of the data that can be presented on a screen (including specified fields or entries) to protect confidential information, such as confidential matters related to the respondent.	Requires Configuration	In addition to data redaction (which is supported by 3rd party tools), Salesforce.com supports encrypted data fields which can be used to securely store data and allow only subset of users to view the clreat text. Encrypted fields uses AES algorithm and a 128 bit encryption key. Encrypted fields are masked when displayed on the screen Redaction with Salesforce can be provided by integrating a 3rd party solution. The list below are some tools that provide document redaction capabilities. There are a couple PDF Editing tools that allow for redaction within their tools and can be integrated directly into Salesforce. The others are full document management systems that integrate with Salesforce that provide both redaction support and document storage that would integrate with the FOIA request in Salesforce: DocHub: Online PDF Editor - https://dochub.com/features/online-pdf-editor PDFfiller: Online PDF Editor - provide APIs and offer a Salesforce Connector, though coming soon:https://www.pdffiller.com/ - Redaction Video:https://www.youtube.com/watch?v=99kMrU-ZKZU SpringCM: Document Management solution that can provide a redaction solution - Contact SpringCM for details Alfresco - Document Management solution that leverages TSG's OpenRedact - http://blog.tsgrp.com/2014/08/07/documentum-or-alfresco-redacting-sensitive-information-with-openredact/ Documentum - Document Management solution that leverages TSG's OpenRedact - http://blog.tsgrp.com/2014/08/07/documentum-or-alfresco-redacting-sensitive-information-with-openredact/
Accessibility			

ID	Requirement Text	Response Code	Assumptions/Comments
CL-005	The proposed solution should comply with current webs accessibility standards and guidelines. *See ATTACHMENT C for itemized requirements* .	Currently Deployed	Salesforce.com is committed to providing on-demand enterprise applications accessible to all individuals. This includes users working with assistive technology, such as speech recognition software and screen readers. To help meet our goal of universal design, salesforce.com follows the internationally recognized best practices in Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA to the extent possible. Please check link for additional information: https://www.salesforce.com/company/legal/508_accessibility.jsp

To help meet our goal of universal design, Salesforce follows the internationally recognized best practices in Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA to the extent commercially reasonable.

The Voluntary Product Accessibility Template (VPAT) is a standardized form developed in partnership by the Information Technology Industry Council (ITI) and the U.S. General Services Administration (GSA) to document a product's conformance with key regulations of Section 508 of the Rehabilitation Act. These documents describe how federal agencies can use Salesforce accessibility features. A third party vendor has completed an accessibility assessment of Salesforce's core CRM products and has documented their accessibility status using these VPATs.

The VPATs are encompassing of the features and functions of Salesforce products and provide an explanation of supporting features. If required, Salesforce will make itself available to review the VPAT and features with the State Bar's Accessibility team to determine the requirements and our ability to assure accessibility.

Copies of VPATs are available on the Salesforce website at: https://www.salesforce.com/company/legal/508_accessibility.jsp. As new or additional VPATs become available, they will be posted to the Salesforce website.

Additional accessibility details can be found at: https://help.salesforce.com/apex/HTViewHelpDoc?id=accessibility_overview.htm&language=en

Below we have highlighted two customer use case examples of accessible solutions deployed on the Salesforce Platform:

Bosma Enterprises - VisionForce
As both a $50 million medical supply company and a not-for-profit provider of services for the blind and visually impaired, Bosma Enterprises operates in a unique space that requires a highly customized CRM and IT architecture. Many of the software vendors they evaluated were unable to conceive a single system that could track an individual's progress through a medical rehabilitation program and also manage warehouse inventory and purchase orders. From the warehouse floor to the executive boardroom, Bosma Enterprises is run by blind and visually impaired workers, and today, every one of them logs into Salesforce to do his or her job. The 360-degree solution, which Bosma calls "VisionForce," is an integrated end-to-end business platform built on the Salesforce Platform. This new tool helps Bosma operate more efficiently and effectively to meet its mission of creating |
CL-006	All users, regardless of disability, should be able to access and use the application. *See ATTACHMENT C for itemized requirements.*	Currently Deployed	Salesforce.com is committed to providing on-demand enterprise applications accessible to all individuals. This includes users working with assistive technology, such as speech recognition software and screen readers. To help meet our goal of universal design, salesforce.com follows the internationally recognized best practices in Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA to the extent possible. Please check link for additional information: https://www.salesforce.com/company/legal/508_accessibility.jsp
ID	**Requirement Text**	**Response Code**	**Assumptions/Comments**
Authentication (Application Users)			

| SEC-001 | The applications must provide a single sign on authentication against the State Bar's Active Directory (AD). If this is not possible the systems user directory must be able to synchronize objects with the central directory and the application providers must work with State Bar IT staff. | Requires Configuration | A federated SSO should be recommened as Delegated Authentication is not a standard-based protocol. Assume the client has configured a SAML 2.0 IdP (Identity Provider), for example ADFS

Logon is form-based. When users log into the Salesforce application, they submit a username and password, which are sent to Salesforce via an TLS-encrypted session. Security features are developed by Salesforce and built into the application. Third-party packages are not used for development or implementation of security internal to the application.

In addition, single sign-on and two-factor authentication may be used to authenticate users. Some organizations prefer to use an existing single sign-on capability to simplify and standardize their user authentication. You have two options to implement single sign-on—federated authentication using Security Assertion Markup Language (SAML) or delegated authentication.

Federated authentication using Security Assertion Markup Language (SAML) allows you to send authentication and authorization data between affiliated but unrelated Web services. This enables you to sign-on to Salesforce from a client application. Federated authentication using SAML is enabled by default for your organization.

Delegated authentication single sign-on enables you to integrate Salesforce with an authentication method that you choose. This enables you to integrate authentication with your LDAP (Lightweight Directory Access Protocol) server, or perform single sign-on by authenticating using a token instead of a password. You manage delegated authentication at the profile level, allowing some users to use delegated authentication, while other users continue to use their Salesforce-managed password. Delegated authentication is set by profile, not organization wide. You must request that this feature be enabled by Salesforce.

Salesforce can be configured to utilize Active Directory directly via Delegated Authentication, or indirectly via Federated Identity using either SAML 1.1, or SAML 2.0. Additionally your users can be loaded from information drawn from your Active Directory servers and modifications made in Active Directory can be propagated into Salesforce.

Customers can use their own SAML Identity Provider, or license one directly from Salesforce with our Identity Connect product |
| SEC-002 | Application must have single sign on capabilities | Currently Deployed | There are two options to implement single sign-on—federated authentication using Security Assertion Markup Language (SAML) or delegated authentication. |
| **Authentication (Portal Users)** | | | |
| SEC-003 | The systems user directory must be able to synchronize objects with the existing central directory and should provide a single sign on to other portal features. | Currently Deployed | SFDC offers Salesforce Identity as a solution to sync AD and SFDC user base. AD users and roles can be mapped to SFDC users and profiles while a running process will always keep both repository in sync. There is a number of other 3rd part products providing the same functionality to SFDC

Salesforce's robust security and data sharing functionality determine the data and records that community users have access to within the portal. Community members can leverage advanced list view functionality to create very specific views for the various objects and data exposed to them. Users can add filters and filter logic to target the specific records of interest, define which columns should be displayed, and click a heading to determine the sort order. Users also have the option of displaying the views in a table grid or Kanban board format. These functions all help users access information more quickly in a format that is customized for their needs. |

| SEC-004 | Authentication should be available even if the system host is unavailable. | Currently Deployed | Force.com Sites enables you to create public websites and applications that are directly integrated with your Salesforce organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through a branded URL of your choice, and make the site's pages match the look and feel of your organization's brand.

Because Force.com sites are served directly from the Salesforce organization, a site's availability is directly related to the organization's availability. During your organization's maintenance window for major releases, your sites will be unavailable; users who try to access a site will see a Force.com-branded maintenance page or your custom Service Not Available Page. It's a good idea to inform your site users of the release maintenance windows and related sites unavailability in advance. You can view specific maintenance windows, listed by instance, at trust.salesforce.com/trust/status/#maint.

Salesforce Authenticator - Salesforce Authenticator is a smart, simple, two-factor authentication solution that increases the security of your Salesforce deployment, while driving a better user experience for your end users. Like soft tokens, Salesforce Authenticator leverages a user's mobile device, making it easy and inexpensive to deploy and manage. However, Salesforce Authenticator advances beyond the limitations of traditional two-factor techniques by using un-phishable, out-of-band approvals. When an action needs to be authenticated, the user is sent a push notification. The user sees contextual information about the authentication and has the option to approve the request or deny it. And since this all happens in a secured, secondary channel, not only is usability improved, but so is the security. |
SEC-005	The proposed solution must be capable of using SAML assertions for inter-tier authentication.	Currently Deployed	Federated authentication using Security Assertion Markup Language (SAML) allows you to send authentication and authorization data between affiliated but unrelated Web services. This enables you to sign-on to Salesforce from a client application. Federated authentication using SAML is enabled by default for your organization.
Authorization			
SEC-006	The Application should support role based access.	Currently Deployed	Access permission are defined by a user's Profile and Role. The user Profile controls access permissions to defined standard and custom objects, as well as all functional capabilities in the application. The user Role, as well as the placement of that role in the organization-defined Role Hierarchy, controls user access to specific data records. For example, a user's Profile may indicate that a user has read, create, edit and delete permissions to the Contact object (table) in the database. However, the user's Role will determine which actual contact records the user will be able to access, which may be a subset of all defined contact records in the database.