



1981 Blake Street
Denver, Colorado 80202
800.877.chfa (2432)
www.chfainfo.com

348 Main Street
Grand Junction, CO 81501
970.241.2341

chfa request for proposal

COLORADO HOUSING AND FINANCE AUTHORITY

REQUEST FOR PROPOSAL (RFP)

COLORADO HOUSING AND FINANCE AUTHORITY

1981 BLAKE STREET

DENVER, CO 80202

Salesforce Implementation Partner

POSTED: July 13, 2026

PROPOSALS DUE: Friday August 14, 2026

Colorado Housing and Finance Authority (CHFA) is a body corporate and political subdivision of the State of Colorado, established by the Colorado General Assembly for the purpose of increasing the supply of decent, safe and sanitary housing for low and moderate income families; and to promote sound economic development by supporting business enterprises. CHFA strongly values diversity, equity, and inclusion among our customers, employees, vendors, and partners. With respect to its programs, services, activities, and employment practices, CHFA prohibits unlawful discrimination against applicants or employees on the basis of age 40 years and over, race, sex, sexual orientation, gender identity, gender expression, color, creed, religion, national origin, ancestry, disability, military status, genetic information, marital status or any other status protected by applicable federal, state or local law. More information on CHFA may be found at the CHFA website, www.chfainfo.com.

Background

CHFA is seeking proposals from qualified Salesforce implementation firms to design, configure, build, implement, integrate, migrate data, test, train, and support a new Salesforce-based solution that will replace one or more existing legacy systems. The selected firm will serve as CHFA's implementation partner and will be expected to provide strategic guidance, technical expertise, project delivery services, and change management support to ensure a successful implementation aligned with business objectives, compliance requirements, and long-term operational sustainability. This solution will also serve as the technical backbone for CHFA's Common Application initiative, which involves collecting and sharing applicant and program participant data across multiple partner agencies accordingly, privacy, data governance, and cross-agency data handling requirements.

CHFA is replacing legacy systems to improve business processes, data quality, customer experience, reporting, workflow automation, governance, and scalability. CHFA seeks a trusted implementation partner capable of delivering not only a technically sound Salesforce solution, but also a collaborative, transparent, and business-focused implementation approach. We value partners who bring strong architectural rigor, disciplined project governance, excellent communication, and a commitment to long-term solution sustainability.

Scope of Services

The selected vendor will deliver software and implementation services to support CHFA's community development functions by implementing an enterprise class Salesforce solution including design, architecture, build, configuration, testing, data migration support, documentation, training, and post go-live support. The vendor will collaborate with both technical and business



stakeholders to design, configure, and deploy the solution across production and sandbox environments. The selected vendor should be able to deliver in a phased methodology and be able to craft realistic phased deliverables in collaboration with CHFA.

- Replacing legacy systems with a modern Salesforce-based platform
- Integrating with a third-party cloud-based document management system that has native Salesforce integration
- Improving operational efficiency through workflow automation and standardized processes
- Enhancing data quality, reporting, visibility, and decision-making
- Integrating Salesforce with key enterprise systems
- Enabling secure, compliant, and scalable solution architecture
- Supporting compliance with applicable privacy laws and CHFA's data governance requirements, including data minimization, purpose limitation, and data segregation and appropriate data access across agencies
- Supporting adoption through effective training and change management
- Provide post go-live support and provide an estimate for services for on-going support
- Establishing a sustainable operating model for long-term support and enhancement

The selected implementation partner will be expected to provide services including, but not limited to, the following:

Discovery and Requirements Validation

- Facilitate discovery workshops with business and IT stakeholders
- Review existing business processes, systems, integrations, and reporting needs
- Validate and refine functional and technical requirements
- Identify opportunities for process redesign and standardization
- Produce requirements documentation and solution backlog

Solution Architecture and Design

- Develop the target Salesforce architecture
- Recommend appropriate Salesforce clouds, features, and components
- Define solution design principles and guardrails
- Document security model, data model, automation design, integration patterns, and environment strategy, including data privacy and governance model
- Produce architecture diagrams and design documentation

Configuration and Custom Development

- Configure Salesforce to meet required business needs
- Develop custom solutions only where necessary
- Apply best practices favoring maintainability, scalability, and declarative capabilities where appropriate
- Configure workflows, automation, reports, dashboards, permissions, and user experiences

Integration Services

- Design and implement integrations between Salesforce and applicable systems, which may include ERP/financial systems, document management systems (Box), data platforms/BI tools, identity providers/SSO, and other third-party applications
- Support API design, middleware configuration, and interface testing

Data Migration

- Assess source data quality and readiness
 - Define migration approach, mapping, cleansing, transformation, validation, and reconciliation
 - Perform trial conversions and final migration
 - Document data migration procedures and results
-



- Identify and appropriately handle confidential data during migration, including data minimization opportunities and legacy data cleanup for records no longer needed under CHFA's retention schedule

Testing and Quality Assurance

- Develop a comprehensive testing strategy
- Support unit, system, integration, regression, performance, and user acceptance testing
- Document defects and remediation activities
- Provide evidence of quality controls and release readiness

Training and Change Management

- Develop training materials and role-based training plans
- Conduct administrator and end-user training
- Support change readiness, communications, and adoption activities
- Recommend strategies to drive successful adoption

Deployment and Go-Live Support

- Plan and execute deployment activities
- Support cutover readiness and go-live implementation
- Provide issue triage, stabilization support, and post-go-live monitoring

Knowledge Transfer and Documentation

- Deliver technical and functional documentation
- Conduct knowledge transfer sessions for administrators, support teams, and business owners
- Ensure long-term maintainability of the solution

Post-Implementation Support

- Describe optional managed services, enhancement support, and operational support models
- Provide SLAs and escalation paths for post-go-live support

Functional Requirements

Vendors should describe their approach to delivering a Salesforce solution capable of supporting the following general business capabilities. Vendors should indicate whether each capability is delivered through standard Salesforce functionality, configuration, custom development, third-party solution, or a combination. (Note – Details of requirements for desired solution are in Addendum.)

General Business Functions Needed

- Intake routing, review, and approvals
 - High-level Entities Data Model: Account, Lead, Contact, Campaign, Deal, Application, Program / Product, Property, Funding Award, Action Plan, Document Checklists
 - Workflow routing, review, and approvals
 - Task management and notifications
 - Entity/account (organization)/contact (individual) management
 - Relationship tracking
 - Document association and management
 - Reporting and dashboards
 - Activity history and auditability
 - Business rules and validations
 - Correspondence generation
 - Record lifecycle management
-



- Data subject rights request support (access, correction, deletion) with audit trail
- Consent and preference tracking, including support for honoring opt-out requests where applicable
- Data segmentation/tagging by originating agency or program to reflect differing privacy and regulatory obligations across multiple partner agencies

User Experience

- Intuitive user experience for business users
- Role-based interfaces and security
- Mobile accessibility where applicable
- Solution meets WCAG accessibility standards
- Searchability and usability

Reporting and Analytics

- Operational reporting
- Executive dashboards
- Ad hoc reporting capabilities
- Data export and downstream analytics support
- Privacy-aware reporting controls, restricting export or display of confidential data based on role and need-to-know

Technical Requirements

Vendors must describe how their proposed solution and implementation approach will address the following technical requirements:

Architecture

- Scalable, maintainable Salesforce architecture
- Alignment with Salesforce best practices
- Preference for low-code/declarative solutions where feasible
- Appropriate use of custom code only when necessary
- Clear environment strategy (dev, test, UAT, prod)

Integration

- API-based integration capabilities
- Real-time and batch integration support
- Error handling, monitoring, and retry strategies
- Secure integration with enterprise systems
- Support for middleware

Data Migration

- Source-to-target data mapping
- Data quality remediation approach
- Historical data handling
- Reconciliation and validation processes
- Cutover strategy minimizing business disruption
- Identify and appropriately handle confidential data during migration, including data minimization opportunities and legacy data cleanup for records no longer needed under CHFA's retention schedule

Security and Compliance

- Role-based access controls
 - Least privilege principles
 - Data protection and encryption
-



- Audit logging and monitoring
- Secure SDLC practices
- Compliance with applicable laws, regulations, and internal policies
- Data minimization and field-level access controls to limit exposure of confidential data across agency boundaries
- Support for multi-agency / joint-controller data governance, including the ability to segregate and restrict access to data collected on behalf of different partner agencies
- Support for data retention schedules and automated disposition

Document and Content Processes

Respondents should describe experience integrating Salesforce with third-party native Salesforce integrated document/content management solutions, including:

- Document storage and retrieval
- Integrating documents with checklist functionality
- Version control
- Metadata management
- Workflow-related document generation or routing
- Data Classification and Retention/governance support

AI / Advanced Capabilities

Please describe experience implementing:

- Salesforce AI capabilities
- Summarization or assistant capabilities
- Intelligent workflow automation
- Predictive insights
- Responsible AI governance and controls

rfp timeline

The anticipated procurement schedule is as follows:

Milestone	Date
RFP Issued	July 13, 2026
Notify of Intent to Apply	July 16, 2026
CHFA NDA provided to applicants	July 17, 2026
Sign and Return CHFA NDA for Addendum A – High-Level Requirements Materials	July 22, 2026
Addendum A – High-Level Requirements Materials distributed to respondents who sign and return NDA	July 22, 2026
Deadline for Vendor Questions (no more than 5 questions per applicant)	July 29, 2026
Responses to Questions Issued	August 5, 2026
Proposal Due Date	August 14, 2026 5 PM MT
Evaluation Period	August 17 - 28, 2026
Top Finalists Vendor Interviews / Demonstrations	August 31 – September 11, 2026
Finalist Selection	Late September 2026
Contract and Vendor Onboarding Period	Q4 2026
Project Kickoff (Estimated)	January 2027



1981 Blake Street
Denver, Colorado 80202
800.877.chfa (2432)
www.chfainfo.com

348 Main Street
Grand Junction, CO 81501
970.241.2341

chfa request for proposal

CHFA reserves the right to modify this schedule at its discretion.

Electronic responses to this request for proposal must be received by CHFA no later than 5:00pm, Mountain Time, on August 14, 2026 at the following email address: implementation_partner_rfp@chfainfo.com

Note: The email Subject line must be "RFP, Salesforce Implementation Partner."

Requests for Additional Information

Requests for additional information and/or questions and requests for clarification may be sent, via email, to: implementation_partner_rfp@chfainfo.com

vendor presentation requirements

Shortlisted vendors may be invited to participate in a 90 minute interview, presentation, and/or solution discussion.

Vendors should be prepared to:

- Present their proposed approach and team
- Walk through a comparable implementation
- Demonstrate how they would approach this project
- Share a high-level design for Salesforce solution
- Discuss governance, risks, and change management
- Answer technical, functional, and executive questions

proposal evaluation

CHFA will consider the following criteria in evaluating the proposals. CHFA reserves the right to adjust evaluation criteria as needed.

Evaluation Category	Weight
Relevant Experience and References	20%
Solution and Technical Approach	15%
Delivery Methodology and Governance	15%
Integration and Data Migration Capability	10%
Proposed Team and Staffing Model	10%
Security, Privacy, and Compliance Approach	10%
Change Management and Training	10%
Pricing and Overall Value	10%

Vendors submitting a proposal for the product and service categories in the RFP shall provide responses using the section headers listed below, while taking special care to respond to all questions posed under sections I – IX. All other items submitted as part of your response should be included as an appendix and referenced as such in your response.

section i – general information

1.01	Company Name	
1.02	Company Website	



1981 Blake Street
Denver, Colorado 80202
800.877.chfa (2432)
www.chfainfo.com

348 Main Street
Grand Junction, CO 81501
970.241.2341

chfa request for proposal

1.03	Company Address	
1.04	Company Size – Number of Employees	
1.05	Please state, as appropriate, your parent company, subsidiaries, affiliates, and other related entities.	
1.06	Financial stability of company	
1.07	Year company established	
1.08	Target Market	
1.09	Describe your firm's Salesforce practice, including years in operation, partner status / tier, and areas of specialization.	
1.10	What differentiates your firm from other Salesforce implementation partners?	
1.11	Please provide three references. References from State Housing Authorities and / or government entities are preferred.	
1.12	Professional / Consulting Services Capabilities	
1.13	Training Capabilities	
1.14	Describe your experience delivering similar Salesforce implementations. • Number of comparable implementations completed in the last 3–5 years • Experience replacing legacy systems • Experience with regulated organizations or mission-driven organizations • Experience with integrations, document-heavy workflows, and complex data migrations	
1.15	Please include examples or case studies of your firm has implemented. Provide at least three (3) relevant case studies that include: • Client type and size • Business problem • Scope and solution delivered • Timeline and budget range • Business outcomes achieved • Key lessons learned Include attachments of supporting details if applicable.	
1.16	How many Salesforce-certified resources do you currently employ, by certification type?	
1.17	Provide your employee retention rate for key delivery roles over the last two years.	
1.18	Please share your most recent customer satisfaction survey results with your services.	



1.19	Please indicate where team members will be located: virtual, local vendor office, remote vendor office, on-site at CHFA.	
1.20	Please explain your company's diversity, inclusion and equity practices.	
1.21	Is there anything else about your organization that will make CHFA confident to move forward with your response to this RFP?	

section ii – proposed approach and methodology

2.01	Describe your delivery methodology and approach, including: • Discovery and requirements validation • Solution design • Configuration and development • Integration delivery • Data migration • Testing and UAT • Training and adoption • Deployment and support • Governance and status reporting • Risk, issue, and scope management	
2.02	Provide the proposed engagement team, including: • Engagement manager / project manager • Solution architect • Technical lead • Functional lead(s) • Data migration lead • QA/testing lead • Change management/training lead • Support lead (if applicable) For each role, include: • Name • Role • Location • Years of experience • Salesforce certifications • Relevant project experience • Expected percentage of allocation to this project Also indicate: • Onshore / nearshore / offshore delivery model • Use of subcontractors, if any • Staff continuity plans and backup resources	



	How do you maintain continuity if a key team member leaves the project?	
2.03	Describe your project delivery methodology and why it is appropriate for this engagement. This could include: • Proposed steering committee structure • Project meeting cadence • Status reporting • Escalation procedures • Decision-making model • RAID (risks, assumptions, issues, dependencies) management • Change management process	
2.04	How do you manage scope changes, dependencies, and issue escalation?	
2.05	What project metrics do you use to monitor delivery health?	
2.06	How do you communicate status to executive sponsors and steering committees?	
2.07	What is your model for collaboration with technology and business stakeholders?	
2.08	How do you approach administrator enablement and knowledge transfer?	

section iii – proposed solution architecture and build

(Note – respondents must Return CHFA NDA for Addendum A – High-Level Requirements Materials)

3.01	Describe your proposed technical approach, including: • Architectural principles • Suggested Salesforce products/features • Integration patterns • Security model • Data strategy • Accessibility and Usability • Environment/release strategy • Approach to scalability and maintainability Provide a sample or illustrative architecture diagram if possible	
3.02	<u>Data Migration Approach</u> Describe your methodology for: • Source system assessment	



	• Data extraction • Cleansing and deduplication • Mapping and transformation • Validation and reconciliation • Historical data migration • Trial conversions • Final cutover	
3.03	<u>Testing and Quality Assurance</u> Describe your QA approach, including: • Testing strategy by phase • Roles and responsibilities • Automation capabilities • Defect tracking and remediation • Entry/exit criteria for major milestones • Support for user acceptance testing	
3.04	<u>Security and Compliance</u> Describe your approach to: • Secure design • Secure development lifecycle • Access controls • Data privacy • Governance Model • Data segregation • Encryption • Audit logging • Vulnerability management • Compliance support Indicate any relevant certifications, attestations, or internal controls.	
3.05	List major assumptions, project dependencies, and potential risks, along with mitigation strategies.	

section iv – architecture and technical approach

4.01	Describe your approach to Salesforce solution architecture.	
4.02	How do you approach determining the best data model and data architecture?	
4.03	How do you determine when to use declarative functionality versus custom development?	
4.04	How do you design for scalability, maintainability, and performance?	



1981 Blake Street
Denver, Colorado 80202
800.877.chfa (2432)
www.chfainfo.com

348 Main Street
Grand Junction, CO 81501
970.241.2341

chfa request for proposal

4.05	Describe your approach to technical debt prevention.	
4.06	How do you ensure architecture aligns with platform best practices and minimizes unnecessary customization?	

section v – integration and data

5.01	Describe your approach to integrating Salesforce with enterprise systems.	
5.02	What integration patterns and tools do you commonly use?	
5.03	Describe your experience with complex data migrations from legacy systems.	
5.04	How do you address data quality issues during migration?	
5.05	How do you ensure data validation, reconciliation, and cutover readiness?	

section vi – security and compliance

6.01	Describe your secure development and deployment practices.	
6.02	How do you design role-based access and least-privilege security models in Salesforce?	
6.03	Describe your approach to protecting sensitive data during migration and integration.	
6.04	How do you support clients with compliance and audit readiness?	
6.05	Describe your process for managing vulnerabilities or security incidents during a project.	
6.06	Describe your approach to data processing/data protection agreements, including data ownership, purpose limitation, and return or destruction of CHFA data upon termination of the contract.	
6.07	Describe your experience supporting multi-tenant or multi-agency data governance models, including field-level or record-level access segmentation to reflect differing privacy obligations across partner agencies.	
6.08	Describe your ability to support data subject rights requests (access, correction, deletion) within the proposed solution, including audit trail and reporting capabilities.	

section vii – training, change management, adoption and ongoing support



7.01	<u>Training, Change Management, and Adoption</u> Describe your approach to: • Organizational Change Management • Stakeholder engagement • Change impact assessment • Communications • Role-based training / Tailored training • How you measure adoption and user readiness • Describe deliverables you provide that support user adoption	
7.02	<u>Post-Go-Live Support</u> Describe: • Describe your support model immediately following go-live. • Support approach • Ongoing support options • SLAs • Ticket handling • Enhancement/backlog support • Knowledge transfer and transition to internal teams	
7.03	How do you prioritize and manage enhancement requests after implementation?	
7.04	How do you transition clients from project mode to operational support?	
7.05	Describe your support model immediately following go-live.	
7.06	What ongoing support options do you offer?	
7.07	What are your SLAs?	
7.08	How do you prioritize and manage enhancement requests after implementation?	
7.09	How do you transition clients from project mode to operational support?	

section viii – innovation and future readiness

8.01	Describe your experience with Salesforce AI or advanced platform capabilities.	
8.02	How do you help clients design for future scalability and enhancement?	
8.03	How do you advise clients on balancing innovation with governance and risk?	



1981 Blake Street
Denver, Colorado 80202
800.877.chfa (2432)
www.chfainfo.com

348 Main Street
Grand Junction, CO 81501
970.241.2341

chfa request for proposal

8.04	What accelerators, reusable components, or implementation assets do you bring to projects?	
8.05	What emerging Salesforce capabilities do you believe are most relevant to organizations like ours?	

section ix – pricing

9.01	Provide a complete pricing response that includes: Implementation Costs • Discovery and planning • Solution design • Configuration • Custom development • Integration work • Data migration • Testing • Training • Deployment/go-live • Post Go-Live Support Pricing Structure • Fixed fee, time and materials, or hybrid • Rate card by role • Price estimate range by potential project phases • Travel assumptions • Third-party software or licensing assumptions • Exclusions • Optional services Ongoing Support Pricing • Managed services • Enhancement support • Hourly/project-based support • SLA tiers	
------	---	--

Legal

1. CHFA and the selected vendor will enter into a contract, describing the terms and conditions of the services to be performed, including vendor compensation.
2. All submitted proposals become the sole and exclusive property of CHFA.
3. As a political subdivision of the State of Colorado, CHFA is subject to the Colorado Open Records Act (CORA) C.R.S. §§ 24-72-201, et seq., which requires CHFA to permit inspection and copying of certain public records. Responders to this RFP (each a “Respondent”) acknowledge and agree that, notwithstanding anything contained therein or in any transmittal, all documents



1981 Blake Street
Denver, Colorado 80202
800.877.chfa (2432)
www.chfainfo.com

348 Main Street
Grand Junction, CO 81501
970.241.2341

chfa request for proposal

submitted to CHFA pursuant to this RFP are not considered confidential or proprietary in any way and may be subject to inspection by the public. By submitting a proposal, Respondents expressly authorize CHFA to disclose such proposals and any related information at CHFA's sole discretion. Respondents should not include any information deemed privileged or confidential in their responses.

4. Additional information that is reasonably necessary for CHFA to fairly and comprehensively evaluate proposals may be enclosed with a proposal, as long as such information clarifies or substantiates written responses.

5. During the evaluation and decision process, CHFA may request additional information or clarifications from responders. At its discretion, CHFA may request certain responders to make oral presentations.

6. CHFA shall not be liable for any expenses, including travel expenses related to preparation of the proposal, any due diligence by the responder and/or CHFA, and the contract negotiation process.

7. CHFA reserves the right to reject any or all proposals after reviewing all responses to this RFP. CHFA is not required by law to conduct this RFP and reserves the right to cancel or withdraw this RFP at any time and for any reason.

8. CHFA is committed to diversity and inclusion with its suppliers to meet the growing needs of its customer base. CHFA staff understands that the purchasing decisions that we, and our vendors make, can impact the community we serve through People, Planet, Purpose, and Price. The four-"P" (4P) procurement standards are embedded in our vendor diversity standards to ensure we are reducing the environmental impact of our purchasing decisions and expanding our diversity outreach, while maximizing the purchasing value of our funds.

9. This RFP and the resulting contract shall be governed by the laws of the State of Colorado and venues for any actions shall lie exclusively in Denver, Colorado. By submitting a response to this RFP, Respondent irrevocably submits to the exclusive personal jurisdiction of the courts located in the City and County of Denver.

10. Written approval from CHFA must be obtained for any media releases regarding an award of the contract by CHFA.

11. By submitting a proposal, Respondent agrees to waive any claim(s) it has or may have against CHFA and/or any of the current or former CHFA directors, officers, board members, employees, or agents arising out of or in connection with (1) the administration, evaluation, or recommendation of any proposal (2) waiver of any requirement under this RFP, (3) acceptance or rejection of any proposal, and (4) award of the contract.

Addendum A – High-Level Requirements

- CHFA will provide Addendum A to those who have notified CHFA of intent to reply to the RFP by July 16, 2026 and have signed a CHFA NDA by July 22, 2026.
-



1981 Blake Street
Denver, Colorado 80202
800.877.chfa (2432)
www.chfainfo.com

348 Main Street
Grand Junction, CO 81501
970.241.2341

chfa request for proposal

COLORADO HOUSING AND FINANCE AUTHORITY

**RESPONSES TO QUESTIONS AND REQUESTS
FOR CLARIFICATION**

COLORADO HOUSING AND FINANCE AUTHORITY

**1981 BLAKE STREET
DENVER, CO 80202**

REQUEST FOR PROPOSAL

To facilitate a transparent and thorough RFP process, CHFA is responding to the following questions and/or requests for clarification, which have been submitted by one or more potential responders in response to CHFA's posted RFP.

Q.

Q.
