

MHBE Board Meeting

January 20, 2026

Salesforce License Renewal

Presented by:

Shirelle Green, Procurement Officer

Dr. Venkat R. Koshanam, CIO

The Salesforce Platform

The Salesforce platform is utilized for managing several business critical functions. In 2026, MHBE will be enhancing and integrating more applications.

- ✓ Customer Relationship Management (CRM) Solution
- ✓ Consultant Time Management
- ✓ Producers Operations Application
- ✓ Computer Telephony Integration (CTI)
- ✓ Procurement Requisition Application
- ✓ Carrier Data Integration Systems
- ✓ Live Chat Integration
- ✓ Appeals Portal
- ✓ Inventory & Asset Management System
- ✓ Automated Escalated Ticket Management process
- ✓ AI Agent Integration



License Costs Comparison

Salesforce License Category	2025 Quantity	2026 Quantity	2025 Cost	2026 Cost (Estimated)*
Service Cloud Enterprise Edition and Government Cloud	425	384	\$1,102,531.08	\$956,222.21
Service Cloud Enterprise Edition Flex Users	100	120	\$27,899.77	\$36,190.48
Partner/Community Members	55	55	\$22,546.71	\$37,697.87
Customer Community Logins	2,000	2,000	\$11,889.33	\$13,929.71
Knowledge Enterprise Edition	2	2	\$2,170.14	\$1,862.73
Sandbox (Full Copy)	1	1	\$218,953.59	\$218,763.40
Data Storage	6	6	\$86,806.40	\$74,509.88
CRM Analytics Plus (New)	5	6	\$12,093.34	\$15,125.53
Lightning Platform Starter & Plus (New)	170	170+49	\$37,544.37	129,508.57
Salesforce Integration User License (New)	-	25	-	\$2,801.00
Total Salesforce License Renewal Cost			\$1,522,434.73	\$1,486,611.38

New Line Items

Adding two lower-cost Salesforce license types to move some users and system integrations from Service Cloud Enterprise licenses, reducing ongoing costs.

New Line Items	Quantity	Purpose & Benefits
Lightning Platform Plus - Enterprise Edition	49	Supports users who only need internal Salesforce apps, allowing them to move off higher-cost Service Cloud licenses and reduce ongoing costs
Salesforce Integration User License - Enterprise Edition	25	Provides API access for reporting, automation, and backups without using full-cost user licenses, lowering cost and improving security for system accounts

Funding for Software

IT software is federally funded at a rate of 66% of the total cost. This funding has been allocated in the FY 2026 IT budget.

Funding Source	2025	2026	Difference
Federal (66%)	\$1,004,806.92	\$981,163.51	(\$23,643.41)
State (34%)	\$517,627.81	\$505,447.87	(\$12,179.94)
Total	\$1,522,434.73	\$1,486,611.38	(\$35,823.35)

Procurement Summary

License Period (1 year) : March 2, 2026 - March 1, 2027

Procurement Method : Intergovernmental Cooperative
Purchase Agreement Task Order
Request for Quote (TORFQ)

Approved Reseller : Carahsoft Technology Corp

Cost of Licenses (2025) : \$1,522,435 (rounded)

Cost of Licenses (2026) : \$1,486,611 (rounded)

Procurement Dates

Quote Received from Reseller	: 08/25/2025
Approval Received from CMS	: 12/01/2025
Board Approval Request	: 01/20/2026
Issue Task Order (upon Board approval)	: 01/22/2026
Complete Procurement	: 01/31/2026

Request for Approval

MHBE requests the Board to:

Exercise the Intergovernmental Cooperative Purchasing Agreement (ICPA) second option year renewal with Carahsoft Technology Corporation for the period from April 1, 2026, to April 1, 2027.

And;

Award contract to Carahsoft Technology Corporation in the amount of \$1,486,611.38, with a Federal Participation of \$981,163.51 and State Participation of \$505,447.87 to procure the Salesforce licenses for the period of March 2, 2026 to March 1, 2027.