



## **REQUEST FOR PROPOSALS**

for Salesforce Services to Support the Built to Last Program

**Issued by:** Philadelphia Energy Authority

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1. Purpose .....	2
2. Background .....	2
2.1 About the Philadelphia Energy Authority .....	2
2.2 About Built to Last.....	2
2.3 About the Existing Salesforce Environment.....	3
3. Scope of Work.....	5
3.1 Project Objectives .....	5
3.2 Requirements.....	5
3.3 High-Level Process Map .....	7
3.4 Success Metrics .....	7
4. Proposal Specifications .....	8
4.1 Anticipated Timeline .....	8
4.2 Intent to Respond .....	8
4.3 Questions .....	8
4.4 Proposal Deadline .....	9
4.5 The Philadelphia Tax and Regulatory Status and Clearance Statement .....	9
4.6 Notice to State Requested Exceptions to Contract Terms and Conditions .....	10
4.7 Proposal Requirements.....	11
4.8 Evaluation Criteria.....	12
5. Public Disclosure and Confidential Information .....	13
6. PEA’s Additional Procurement Rights .....	13
7. Costs.....	14
Appendix A: City of Philadelphia Tax Status and Clearance Statement.....	15
Appendix B: Program Services Agreement .....	16
Exhibit A: High-Level Process Map.....	17

# 1. Purpose

The purpose of this Request for Proposals (“RFP”) is to solicit pricing proposals from Salesforce consulting firms (“Consultant”) who can lead discovery, design, implementation and testing to modify an existing Salesforce environment. The environment is currently in use for two programs - Solarize Philly and Built to Last. The Philadelphia Energy Authority (“PEA”) intends to revamp its current Salesforce processes for Built to Last, to incorporate feedback from the current pilot program and to take better advantage of the built-in capabilities of Non-Profit Cloud and the partner community (Experience Cloud). The fundamental goal is to enable the Built to Last program to scale to serve a larger number of homeowners and partners in the future.

The selected vendor, if any, will serve as the primary consulting firm for the agreed-upon Salesforce work for PEA.

## 2. Background

### 2.1 About the Philadelphia Energy Authority

The Philadelphia Energy Authority is an independent municipal authority established in 2010 focused on issues of energy affordability and sustainability for Philadelphia. In 2016, PEA and City Council President Darrell Clarke launched the Philadelphia Energy Campaign, a \$1 billion, 10-year investment in energy efficiency and clean energy projects to create 10,000 jobs. To date, PEA has helped launch over \$291 million in projects, and created over 2,500 jobs. Learn more at <http://www.philaenergy.org/>.

PEA is a municipal authority and political subdivision of the Commonwealth of Pennsylvania, formed by the City of Philadelphia under the Pennsylvania Municipality Authorities Act, 53 Pa.C.S. § 5601 *et. seq.* (“the Act”) for the purposes described in the Charter and included below:

*The Authority’s purposes and responsibilities shall be limited to actions for and concerning (i) the development, facilitation and/or financing of energy storage and/or generation projects, (ii) the development, facilitation and/or financing of energy efficiency projects, and (iii) the purchase or facilitation of energy supply and energy services on behalf of the City of Philadelphia, government agencies, institutions and businesses, as well as the education of consumers regarding choices available in the marketplace, and (iv) the promotion of a vital clean energy sector of the Philadelphia economy and increased employment in the sector by undertaking efforts to strengthen the markets for energy efficiency and energy storage and generation projects. The Authority shall have and may exercise all of the powers set forth in the Act that are necessary or convenient for carrying out its purposes and responsibilities.*

### 2.2 About Built to Last

PEA launched Built to Last in 2021. Built to Last provides a powerful backbone that layers, coordinates, and supplements existing home repair programs that achieve energy efficiency and weatherization,

health and safety improvements to address social determinants of health, climate resilience, and the preservation and stabilization of existing affordable housing.

Each comprehensive retrofit relies on coordinated funding from partner programs, such as the city's Basic Systems Repair Program, Weatherization Assistance Program, HUD's Lead and Healthy Homes, and local utility conservation programs. PEA and its partners evaluate holistic home repair needs and match those with existing funding sources to coordinate a comprehensive retrofit.

This initiative focuses on historically marginalized communities and will serve at least 250 homes by 2025. BTL addresses three gaps that have historically prevented low-income households from receiving home interventions that fully meet their needs: a) ensuring households can find and apply for the full set of programs for which they are eligible, b) assessing and identifying all home restoration needs, and c) coordinating the deployment of services to streamline home restorations, avoid deferrals, and maximize impact.

## 2.3 About the Existing Salesforce Environment

There are two programs operating in the Salesforce environment today - Solarize Philly and Built to Last. These programs have only a small amount of overlap.

### *2.3.1 Solarize Philly Salesforce Usage*

The Solarize Philly program utilizes a web form, built on Formstack, to generate leads from Philadelphia residents or businesses interested in installing solar on their properties. The program accepts commercial, residential, and multi-family properties. These leads are distributed to various partner solar installers based on criteria that is managed in a flow.

Once routed to installers, the leads are converted into opportunities. Opportunities are considered unique only if they are for the same individual property, the same installer, and the same phase of the program. Opportunities are updated by installers, either directly in the system or via weekly exports from their own CRM system, which is then imported into Salesforce.

The program primarily uses the lead, account, contact, and opportunity objects. There are some legacy custom objects in the system associated with this program that are not actively being used. The Solarize program also has a customer satisfaction survey created in Salesforce.

Installer partners access the leads, opportunities, and reports via a partner community.

### *2.3.2 Built to Last Salesforce Usage*

The Built to Last program utilizes a series of custom objects to manage the intake process and the construction projects for low-income Philadelphia residents who need home repair and energy efficiency renovations in their homes.

New referrals to the program come from various partner programs. These referrals are entered into Salesforce either manually or through a Formstack form and are stored in a Built to Last (BTL) application object. A case manager contacts the participant to gather information and documents, which is referred to as intake. The intake data and documents can be collected via a Formstack form or directly into Salesforce.

A home assessment is scheduled and conducted. Information from the home assessment is collected in an Excel spreadsheet. The list of work that needs to be done in the home is imported into Salesforce into work orders with child work order items, both of which are custom objects. These work orders are associated to the BTL application object. A work order is created for each trade and funder combination, e.g. all carpentry work being funded by Habitat for Humanity would be associated to a single work order, while carpentry work being funded by PEA would be associated to a separate work order.

There is also a post-service survey object that is populated by completion of a Formstack form at the end of the process and is associated to the BTL application object.

Reporting for the program is done via Salesforce reports and dashboards and generally falls into one of the following categories:

- Status of applications
- Completeness of intake process (documents collected)
- Demographics of the participants
- Status of work orders
- Estimated and final pricing in totals and averages (per partner, per home)
- Time to reach various program milestones (from referral or assessment date)
- Survey results

### *2.3.3 Program Overlap in Salesforce*

Participants in the Built to Last program also have the option to have solar installed as part of their program. This is tracked on an opportunity record, though the opportunity has a different record type and a different sales process than the Solarize opportunities and is associated with the BTL application. There is some overlap in fields with the Solarize record type, but in general, the Built to Last solar process is simpler because the solar is heavily or fully subsidized by PEA and there is virtually no sales process.

## 3. Scope of Work

### 3.1 Project Objectives

This engagement is focused on, but not limited to, the following objectives:

1. Restructure the data model to utilize the standard objects of core Salesforce and the Nonprofit Success Pack in lieu of the current, custom object-centric model
2. Improve efficiency and document management and reduce time spent on common tasks being done by BTL program manager and program partners in Salesforce as detailed below
3. Enhance ability to distribute and track grant spending, while respecting funder restrictions and reporting requirements
4. Enable self-service options for BTL participants
5. Add additional construction project management and scheduling functionality

### 3.2 Requirements

While the technical solution will only be determined after discovery/requirements gathering for the relevant components, the RFP response should include a brief narrative response on the approach and possible ways to tackle the challenges identified in the outlined objectives.

#### *Objective 1*

**Restructure the data model to utilize the standard objects of core Salesforce and the Nonprofit Success Pack in lieu of the current, custom object-centric model**

The proposed solution should address the following challenges that have been identified with the current data model:

- Too much disparate information collected on the BTL application object, including household-level, contact-level, property-related, and project-specific information
- Difficulty in adequately reporting on roll-up data at the household level with respect to costs, number of partner programs engaged, and work order/project status

#### *Objective 2*

**Improve efficiency and document management and reduce time spent on common tasks being done by BTL program manager and program partners in Salesforce**

The proposed solution should address the following challenges identified in the current system:

- Difficulty finding items due to the quantity of documents associated with each home - utility bills, income verification documents, deeds, before and after photos, construction estimates and invoices, etc.
- Manual adjustment (via sharing settings) on every document in order for partners to access documents associated to records

- Hard to keep track of which documents have been collected and which are still pending for which home and/or which work order
- A lot of time is spent manually updating information in the system related to intake, the home assessment, and construction progress
- Lower than ideal adoption of Salesforce by program partners for managing day-to-day tasks, due partially to the time required and partially due to duplication of effort with their internal company processes/systems/requirements
- Some system entry tasks or updates are forgotten or neglected by users for too long, e.g. work pending estimates from contractors or needing to be scheduled

### *Objective 3*

#### **Enhance ability to distribute and track grant spending, while respecting funder restrictions and reporting requirements**

The proposed solution should address the following challenges identified with the current approach:

- The current solution has insufficient support for complex funding scenarios, e.g. tracking and reporting on work partially funded by several grants or partner programs
- New funding sources continually require different reporting formats and data that are not all easy to extract or synthesize
- The current solution has no current support for tracking restricted grant spending

### *Objective 4*

#### **Enable self-service options for BTL participants**

The proposed solution should address the following challenges identified with the current approach:

- Intake process currently requires all data and documents be collected by a case manager, causing delays
- Team members spend too much time tracking down missing documents and data
- Homeowners lose visibility into the status of the work being done on their house, short of calling the construction manager or case manager; there are currently no options for email or SMS-based communications through the system
- Those who originally referred the homeowner (from partner programs) have no visibility into the status and if the homeowner contacts them, have no way of checking the status short of contacting PEA directly for a one-off update

### *Objective 5*

#### **Add additional construction project management and scheduling functionality**

The proposed solution should address the following challenges identified with the current approach:

- It is difficult to see at a glance which tasks the construction manager needs to be prioritizing, e.g. which are overdue or otherwise high priority

- As contractors are not exclusive to our program, we often have minimal visibility into when they are going to complete our work
- There is no clear reporting to see what is being done at what home on what day

#### *Other General Considerations*

The proposed narrative approach should also take the following requirements into consideration:

- Approach should include discovery, design, development, and testing, regardless if proposing agile or waterfall methodology
- Proposal should include some amount of training on and documentation of the solution, both for the internal PEA team (2) and partners (up to 8), and should include a recording for training future partners
- Solutions must take into account the population of low-income, largely elderly homeowners we work with, who may not be comfortable with or have access to all digital tools
- Solutions should not rely heavily on the purchase of additional licenses or products
- Solutions should take into account the technical restrictions due to the fact that the vast majority of Built-to-Last Salesforce users use partner licenses
- Solutions should identify areas for optimization, auto collection or entry of data, simple and easy reporting that is meaningful or easily adjusted or adaptable as program needs or phases change across users. Note that most BTL Salesforce users are either working most of the day in their own internal systems or are out in the field and are therefore limited in their ability to respond to time consuming or multistep data entry and reporting features
- Existing, ongoing operations of both Solarize and Built-to-Last should be minimally impacted during the engagement and during future modifications
- Customizations requiring code or managed packages should only be proposed where native functionality is nonexistent or not recommended for technical or functional reasons
- Solution should largely be developed in a manner to be maintained and adjusted in the future by the internal PEA team
- Proposals should plan on a primarily remote engagement with minimal travel/onsite required
- Proposals should be based on hourly rates per resource. Note that PEA must adhere to the federal procurement standards described in 2 CFR § 200.318-326. As such the final contract will contain a ceiling price that the Contractor exceeds at its own risk.
- Proposals should include an option for adding on future work to support either Built to Last or Solarize

### 3.3 High-Level Process Map

The high-level process for Built to Last can be seen in **Exhibit A**.

### 3.4 Success Metrics

A successful project will demonstrate:

- Increased adoption and usage of the system by BTL partners



- Reduction in the time spent to complete common tasks
- Improved reporting capabilities
- Improved self-service capabilities

## 4. Proposal Specifications

### 4.1 Anticipated Timeline

Milestone	Target Date
RFP released	November 8, 2022
Intent to apply	November 25, 2022
Deadline to submit questions	December 2, 2022
Question responses posted	December 7, 2022
Proposals submitted	January 6, 2023
Finalist interviews (estimated)	Week of January 9, 2023
Final selection announced (estimated)	January 27, 2023
Project start (estimated)	February 13, 2023
Project completion (estimated)	July 28, 2023

### 4.2 Intent to Respond

Respondents are strongly encouraged to submit a statement of your Intent to Respond to BuiltToLast@philaenergy.org with the subject “Built to Last RFP Intent to Respond - [Firm Name]” by 5pm EST on Friday, November 25, 2022.

### 4.3 Questions

All questions regarding Built to Last and this RFP must be submitted by email to

BuiltToLast@philaenergy.org.

Responses to questions received before 5pm on Friday, December 2, 2022 will be emailed to all Respondents who have submitted statements of Intent to Respond and posted on the RFP page on the PEA website ([www.philaenergy.org](http://www.philaenergy.org)). Contractors responding to this RFP are urged to check the website for the responses to the questions. All responses will be issued by 5pm on December 7, 2022. Oral responses by any PEA employee or agent of PEA are not binding and shall not in any way be considered as a commitment by PEA.

#### 4.4 Proposal Deadline

Respondents to this RFP must submit an electronic version of all requested documents by email to BuiltToLast@philaenergy.org with the subject "Built to Last RFP Response - [Firm Name]" no later than 5pm on Friday January 6, 2023. Responses received after the deadline will not be considered.

#### 4.5 The Philadelphia Tax and Regulatory Status and Clearance Statement

It is the policy of the City of Philadelphia and PEA to ensure that each Contractor and subcontractor has all required licenses and permits and is current with respect to the payment of City taxes or other indebtedness owed to the City (including, but not limited to, taxes collected by the City on behalf of the School District of Philadelphia), and is not in violation of other regulatory provisions contained in the Philadelphia Code. To assist PEA, through the City of Philadelphia Department of Revenue and Department of Licenses and Inspections, in determining this status, each Respondent is required to submit with its proposal the certification statement entitled City of Philadelphia Tax and Regulatory Status and Clearance Statement which is attached to this RFP as **Appendix A** and a Tax Compliance Certificate from the City of Philadelphia which can be requested at <https://rev.phila.gov/taxcompliance/>.

If the Respondent is not in compliance with the City's tax and regulatory codes, an opportunity will be provided to enter into satisfactory arrangements with the City to achieve compliance. If satisfactory arrangements cannot be made, Respondents will not be eligible for award of the contract contemplated by this RFP.

The pre-approved Respondent will also be required to assist PEA in obtaining the above information from its proposed subcontractors. If a proposed subcontractor is not in compliance with City Codes and fails to enter into satisfactory arrangements with the City, the non-compliant subcontractor will be ineligible to participate in the contract contemplated by this RFP and the pre-approved Respondent may find it necessary to replace the non-compliant subcontractor with a compliant subcontractor. Respondents are advised to take these PEA policies into consideration when entering into their contractual relationships with proposed subcontractors. If a Respondent or a proposed subcontractor is not currently in compliance with the City's tax and regulatory codes, please contact the Revenue Department to make arrangements to come into compliance at 215-686-6600 or [revenue@phila.gov](mailto:revenue@phila.gov).

Respondents need not have a City of Philadelphia Business Income and Receipts Tax Account Number (formerly Business Privilege Tax Account Number) and Commercial Activity License Number (formerly Business Privilege License Number) to respond to this RFP, but will be required to obtain both prior to commencing work if pre-approved for award of the contract contemplated by the RFP.<sup>1</sup> Applications for a Business Income and Receipts Tax Account Number or a Commercial Activity License<sup>2</sup> may be made online by visiting the City of Philadelphia Business Services Portal at <https://business.phila.gov/> and selecting eCLIPSE to submit online applications. If you have specific questions, call the Department of Revenue at 215-686-6600 for questions related to City of Philadelphia Business Income and Receipts Tax Account Number or the Department of Licenses and Inspections at 215-686-2490 for questions related to the Commercial Activity License.

#### 4.6 Notice to State Requested Exceptions to Contract Terms and Conditions

PEA's Program Services Agreement is attached to this RFP as **Appendix B**. By submitting a Proposal in response to this RFP, the Respondent agrees that, except as provided here, it will enter into a contract with PEA containing substantially the Contract Terms and Conditions contained in **Appendix B**.

If Respondent wishes to request revisions to the attached Contract, respondents must provide an annotated copy of the Contract with the requested revisions. For each requested revision, the Respondent must propose alternative language or terms using tracked changes and state the reason for the request in a comment.

Requested exceptions to PEA's Contract Terms and Conditions will be approved only when PEA determines in its sole discretion that a Requested Revision makes business sense, does not pose unacceptable risk to PEA, and is in the best interest of PEA. By submitting its proposal, the Respondent agrees to accept all Contract Terms and Conditions to which it does not expressly seek a Requested Revision in its proposal. Blanket reservation of rights to exceptions to the full contract will not be accepted. PEA reserves the right, in its sole discretion, to evaluate and reject proposals based in part on whether the Respondent's proposal contains Requested Revision to Contract Terms, and the number and type of such requests and alternative terms proposed.

If, after PEA issues its notice of intent to contract to a Respondent, the Respondent seeks Requested Revision to Contract Terms that were not stated in its proposal, PEA may, in its sole discretion, deny the Requested Revisions without consideration or reject the proposal.

PEA reserves the right, in its sole discretion, (i) to waive any failure to comply with the terms of this

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<sup>1</sup> Respondents that have a Business Privilege Tax Number should use that number, as it is automatically their Commercial Activity License Number, and need not apply for a new Commercial Activity License Number. Similarly, Respondents with a Business Privilege Tax Account Number should use that number as their Business Income and Receipts Tax Account Number.

<sup>2</sup> Commercial Activity Licenses are not typically required for non-profit organizations; however, Business Income and Receipts Tax Account Numbers typically are required.

Notice if it determines it is in the best interest of PEA to do so; and (ii) to require or negotiate terms and conditions different from and/or additional to the Contract Terms and Conditions in any final contract resulting from this contract opportunity.

## 4.7 Proposal Requirements

Respondents are encouraged to be concise and to respond as directly as possible to the requirements set forth in this RFP. The requirements set forth in this Section represent the minimum content required and, unless expressly stated otherwise, are not intended to limit substantive content. It is Respondent's responsibility to include information in the Proposal that meets the minimum content requirements and any additional information that further demonstrates relevant experience and capabilities.

### Part I: Provider Info

- Include your legal business name
- Include address of company headquarters
- Include main point of contact for the RFP response with contact information
- Include a brief organizational description and list of services/products offered related to the scope of services
- Provide the number of employees and a breakdown of those in Pennsylvania and in Philadelphia
- Indicate if your business is a Local Business Entity (LBE)<sup>3</sup> in Philadelphia or Minority-/Woman-/Disabled-Business Enterprise (M/W/DBE) and if so, which entity did the certification
- Include a description of your company's efforts to increase diversity, equity, and inclusion within the company and/or your local community
- Describe commitment to recruiting candidates for new positions who reside in the City of Philadelphia, who identify as minority, women, disabled, returning citizens, and/or veterans

### Part II: Technical Approach

Provide a response to each of the project objectives explaining how you would approach each technically based on the information provided.

### Part III: Project Delivery

- Include the project methodology and/or implementation plan
- Include a training plan for PEA employees and partners (up to 10 individuals)
- Include the project timeline with key milestones (if applicable)
- Include the proposed resources and responsibilities of each
- Include dependencies and assumptions
- Include proposed deliverables
- Include the project budget with hourly rates per resource

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<sup>3</sup> <https://www.phila.gov/services/business-self-employment/bidding-on-a-city-contract/get-certified-as-a-local-business-entity/>

#### **Part IV: Capabilities & Experience**

- Include the number of consultants with project experience in Non-Profit Cloud
- Include the number of consultants with project experience in Experience Cloud (Partner Communities)
- Include the number of consultants with certifications in Non-Profit Cloud
- Include the number of consultants with certifications in Experience Cloud (Partner Communities)
- Describe 3 relevant projects, which should ideally contain at least two of the following: similar project structure, similar scope of work, work in Non-Profit Cloud, work in Experience Cloud, or a similar industry/government client. Descriptions should include: business context, project scope, your role in the project, the size and structure of the program team, key metrics and results, and any lessons learned
- Include two (2) customer references, a brief description of your work with them, and contact information for each

Proposals should be no more than 25 pages, in a font size no smaller than 11 point.

#### **4.8 Evaluation Criteria**

Proposals in response to this RFP will be evaluated by the Built to Last project team based on the following criteria:

- **Relevant experience, qualifications, and references**
  - Experience working with both Non-Profit Cloud and Partner Communities (Experience Cloud)
  - Consultants with active certifications in Experience Cloud and Non-Profit Cloud
  - Successful case studies for similar projects
  - Satisfied customer references
- **Technical approach**
  - Clearly outlined dependencies and assumptions
  - Completeness of solution in addressing all items in the scope of work with an explanation for additional items included and/or any items left out as not recommended
  - Clearly outlined how solution will achieve objectives
- **Work plan, staffing and schedule**
  - Realistic overall timeframe to start and complete the work
  - Adequate time allocated to key tasks, including discovery, design, implementation, testing, and training
  - Appropriate resources to complete the work in the proposed timeline
  - Appropriate delivery methodology
- **Value, pricing, and contract terms**
  - Pricing structure proposed (hourly rates + actual expenses)
  - Value of services for proposed price
  - Alignment of contract terms
- **Alignment with PEA mission, vision, and values**

- Support for local jobs and economic development
- Diversity and equity

## 5. Public Disclosure and Confidential Information

All Responses, Exhibits, and other information submitted in response to this RFP are subject to the public disclosure requirements of applicable law, including the Pennsylvania Right to Know Law. To the extent permitted by applicable law, PEA will use its best efforts to keep from public access the specific information that is identified by the Contractor as confidential. If a Contractor claims an exception to public disclosure requirements and desires that PEA keep certain information from public disclosure, then the Contractor must include a notice in the Proposal as follows:

*“Confidential Information Notice Pages \_\_\_\_\_ of this Proposal, identified by a bold vertical line along the right-hand margin, contain information that is excluded from public disclosure under applicable law. Contractor requests that such marked information be utilized by PEA only for evaluation of this Proposal, but Contractor understands that PEA is bound by applicable law and that such information may be disclosed in accordance with such law.*

Notwithstanding any such notice, however, PEA may disclose such marked information to individuals participating in the review or evaluation of Proposals, including members of the Selection Committee, other PEA employees, and advisors, attorneys, and consultants.

## 6. PEA’s Additional Procurement Rights

PEA reserves the right to modify this selection process, which may be exercised in its sole discretion at any time during the procurement process to:

- Cancel this RFP or the procurement process, with or without the substitution of another pre-qualification or procurement process;
- Waive any informality, defect, non-responsiveness, or deviation in a Proposal, or other submission, that is not material;
- Require one or more Contractors to supplement or clarify the Proposal or to provide additional information after the submission of Proposals including with respect to any exceptions to PEA’s Contract Terms and Conditions;
- Take any action affecting the RFP process that would be in the best interests of the PEA or City;
- Conduct investigations and make inquiries concerning any aspect of any Proposal;
- Reject any or all Proposals;
- Reject a Contractor that has been delinquent or unfaithful in the performance of any contract with or obligation to the PEA or City is financially or technically incapable, or is otherwise not responsible; and/or

- Make judgments about the contents of any Proposal with respect to the requirements and criteria set forth in this RFP.

## 7. Costs

Any and all costs incurred by the Contractor, or other party in connection with this RFP or other aspect of the procurement process shall be at such party's expense and risk. Procurement Team accepts no liability and will not be responsible under any circumstance for any cost or expense incurred to respond to this RFP or otherwise participate in the procurement process.

## Appendix A: City of Philadelphia Tax Status and Clearance Statement



## Appendix B: Program Services Agreement

## Exhibit A: High-Level Process Map

(Included as a separate attachment)

**Notes:**

The abbreviations used in the map are as follows:

BSRP: Basic Systems Repair Program (from Philadelphia Housing Development Corporation)

UESF: Utility Emergency Services Fund, which provides the case management services for the program

BTL: Built to Last