



**Q. Generally your footprint with Salesforce seems quite modest right now, are you planning on a significant expansion in order to accommodate the scope you have articulated in your RFP?**

A. As Built to Last was a pilot program, the use of Salesforce to date has been limited to partners involved in the initial pilot. As the program scales, use of Salesforce is expected to grow as well. This RFP is seeking a partner who can build out the environment in a scalable way for the planned growth as stated in the RFP.

**Q. Can you confirm your use of the Non-Profit Success Pack and the expectations for its inclusion in the solution?**

A. It is not a requirement that the proposed solution includes NPSP. However, we do have it installed in our environment and so it can be included as an option if desired.

**Q. Do you have a certified Salesforce Administrator on staff?**

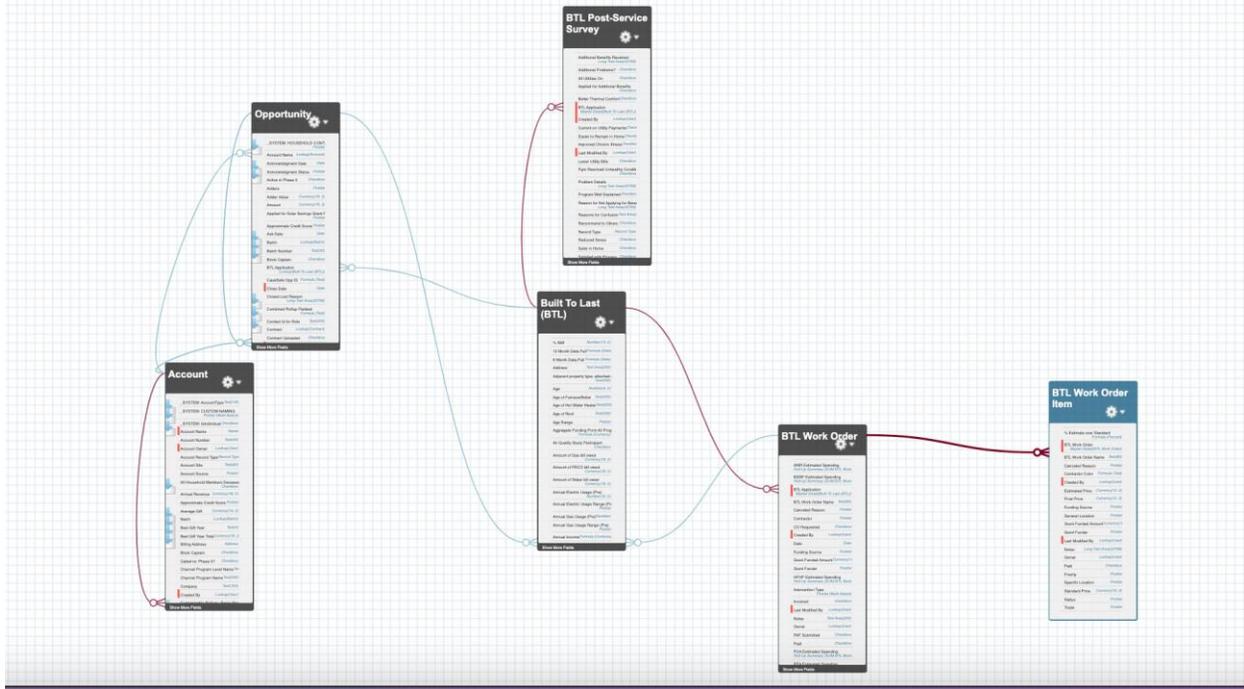
A. Yes.

**Q. Do you have Salesforce Unlimited or Enterprise edition?**

A. Enterprise

**Q: Can you please provide an Entity Relationship Diagram (ERD) of the Salesforce objects being used?**

A. See below the Schema Builder diagram of the primary objects in use for BTL, but please keep in mind that it is not required to retain this structure.



**Q. Approximately how many hours per week of support do you expect for future work?**

A. Unknown.

**Q. Can you quantify what the minimal travel onsite required is?**

A. There is no minimum required. We suggest you propose the travel you think would add value to the engagement.

**Q. Do you have a preference between Agile or Waterfall?**

A. We have experience with both.

**Q. What resources is the PEA allocating toward this project (subject matter experts, etc.)?**



A. You will have dedicated time from the BTL program manager (and Salesforce administrator) throughout the engagement and will be able to meet with other team members and partners as required.

**Q. Do you have any reporting tools in use outside of Salesforce for enhanced reporting (Tableau, Power BI, etc.)?**

Not currently.

**Q. What outside systems are being used by partners that result in duplication of effort?**

A. Several team members also have Salesforce. Some use custom-built systems. One uses Hancock.

**Q. Does each partner user have a login or do all partners use a shared login?**

A. Each partner agency has their own login.

**Q. Do you have licensing for BTL participants to use Salesforce Experience Cloud for self-service functionality?**

A. We do not currently have licenses for the BTL participants themselves to use the community. This is an option you can propose if you feel it would add value considering the demographics of our population.

**Q. Do all resources need to be US-based?**

A. Yes.

**Q. What is the budget for this RFP?**

A. We are seeking proposed budgets from applicants for this project but we do not have a budget to share publicly.



**Q. Who implemented Salesforce originally?**

A. The original Salesforce implementation for Built to Last was done internally.

**Q. According to the RFP, “Solutions should not rely heavily on the purchase of additional licenses or products.” How many and what type of Salesforce license types/products are currently held by PEA? Will any additional internal users beyond the current users need access to the system?**

A. PEA currently has Sales Cloud Enterprise edition, Lightning Platform Plus, and 10 partner licenses. If your solution requires additional products or licenses, please include that assumption in your proposal response.

**Q. Please provide the number of external users (grant recipients) who will need access to the system.**

A. We estimate that in the short term, we may need to provide access to 5-10 additional partners.

**Q. How much grant funding is typically managed by PEA in a given fiscal year?**

A. The only grant funding being managed by PEA is associated with the Built to Last program. The spending is currently less than \$1M per year and will increase as the program grows.

**Q. Is the Solarize and Built to Last Program the only programs expected to be managed in the new system? Do you anticipate adding other grant programs this year, and if so, how many?**

Those are currently the only two programs being managed in Salesforce. It is not necessary to include additional programs in this specific RFP response.

**Q. Will this project require data migration from existing systems? If so, please describe the data, the number and type of records, the total size of the files, etc.**



A. BTL program data generated by PEA is already within Salesforce. If you are proposing a new data model, please include migration to the new objects in your proposal.

**Q. Does the agency hold licenses for an electronic signature tool you would like to use as part of this solution? If so, please provide the name. If not, do you have a preferred tool or would you like this to be included in the proposal?**

A. We do not currently have this within PEA. However, several of our program partners are using their DocuSign accounts for documentation related to BTL and we would prefer consistency between our systems where logical.

**Q. Please elaborate on the agency's preference for future systems maintenance. Does the agency prefer future support and maintenance is done by the selected partner, internal team or a combination of both?**

A. We prefer that basic support and maintenance can be managed internally. However, we do anticipate the need for further development on the platform as we scale, which would be handled externally.

**Q. Is the vendor required to be on site for any portion of the contract term?**

A. We do not have a minimum requirement. We suggest you propose what you feel suits your proposed engagement structure.

**Q. Is PEA tax exempt? If so, are you able to provide a tax exemption certificate if needed?**

A. Yes, PEA is a tax-exempt entity and we can provide a certificate if needed.

**Q. Is PEA working with Salesforce to transition from Sales/Experience cloud to NPSP?**

A. We already have the Non-Profit Success Pack installed in our environment, and you may choose to include elements from it in your solution if desired.



**Q. Would a combination of Sales/Service cloud to bring in case management functionality be an acceptable method for enhancements?**

A. We are not requiring any specific solution and suggest you propose the approach you feel best meets the requirements outlined in the RFP.

**Q. Is the NPSP installed in the same environment as the Sales Cloud application currently? Is the NPSP in use in any way currently?**

A. It is installed but not in active use.

**Q. Is there a specific method or form you would like vendors to use for the pricing breakdown?**

A. Proposals should be based on hourly rates per resource and should ideally include a not-to-exceed price. You may use your own format provided you include those elements.

**Q. Is the BTL Participant's Status of Work Being Done something that can be shown publicly on a website when an address is entered, or does it have to be hidden behind a login screen?**

A. All information needs to be confidential and secure, including the work being done on the Participants' homes.

**Q. Are you using the Salesforce Mobile App today in any capacity?**

A. We are not.

**Q. Do you have access to Salesforce Quip today? If so, how are you using it?**

A. We do not have Quip right now.



**Q. Are you open to leveraging OCR capabilities from Salesforce? Use could be for scanning information from available documents directly to Salesforce fields.**

A. Yes, we are open to considering that.

**Q. What is the average intake volume of applications? (Daily/Monthly)**

A. We will be doing intake for approximately 100 homes in the next six months, with much of that front-loaded in the first quarter, and expect to at least triple that volume by the second half of 2023.

**Q. How many construction projects on average do you do in a year?**

A. Our pilot covered 50 homes. We are targeting 50 homes in the first half of 2023, and ramping up to 150 in the subsequent phase.

**Q. Any reason for sticking with Formstack?**

A. We already have forms live on this for both Solarize Philly and Built to Last, but you are welcome to propose alternatives.

**Q. I didn't see license counts mentioned for full Sales Cloud licenses and Platform Plus licenses – do you have those figures?**

A. PEA currently has one active internal Salesforce user for Built to Last.

**Q. What is PEA's operating budget?**

A. To provide a sense of scale, PEA's annual operating budget is roughly \$4MM.