



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?

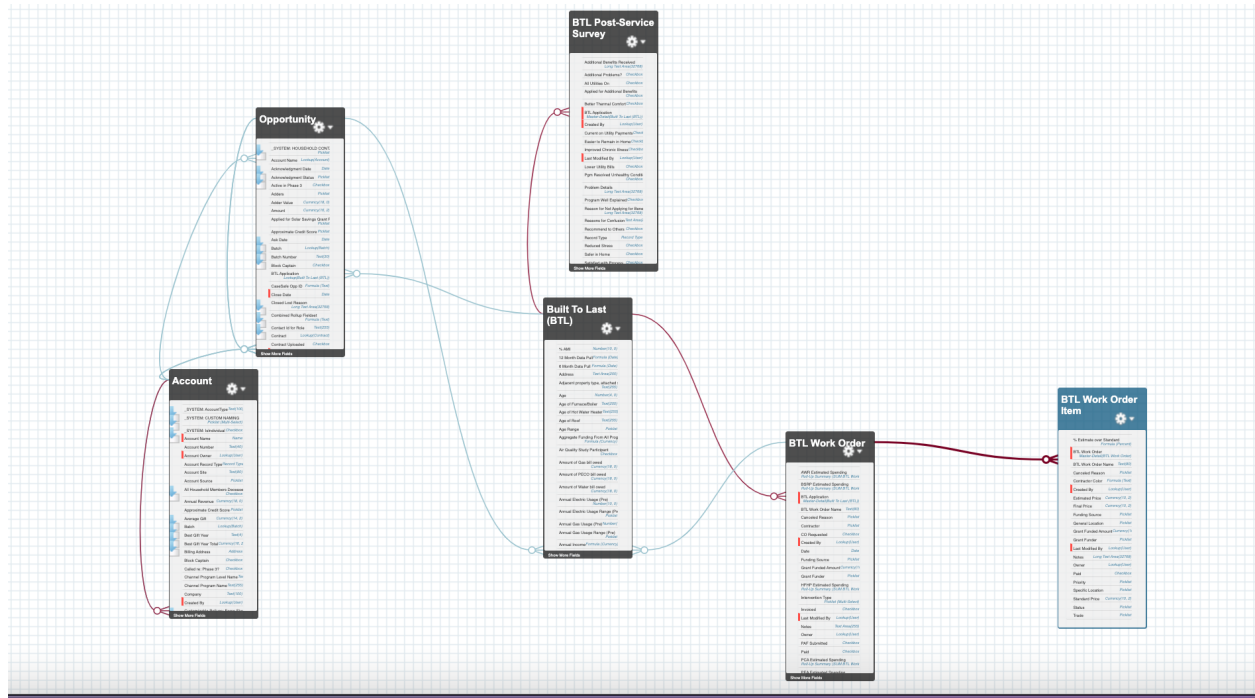
A. Yes.

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 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.

Q. Can the Proposer (prime vendor) partner with other sub-contractor to bid for this RFP?



A. Yes, but per section 4.5, all subcontractors must comply with city codes.

Q. Can the vendor deliver this in onsite and offshore model? Can we have technical experts from offshore also work on the delivery of the project after winning?

A. All resources must be US-based.

Q. If selected, do you have documentation of existing system, user manual, system design, integration/data flow diagrams, and any other?

A. There is some documentation of the existing system, including a user playbook and documentation of some flows, but it is not comprehensive.

Q. Can you please provide list of tools used for project executions

A. The tools used are already detailed in the RFP.

Q. Generally, we recommend Agile methodologies for project execution, do you follow the same ?

A. You can propose an agile methodology for this engagement. Our primary users are experienced with it.

Q. In case of remote resources, do they need to be in specific timezone?

A. No, as long as they are US-based and the work is not hindered by the resources' time zones.

Q. Can we org health score for current instance?

A. If you're referring to the Security Health Check, it is 65% against the baseline standard.

Q. Can we have number for following



1. Apex Classes

2. Process Builders

3. Validation Rules

4. Custom Objects

5. Installed Packages

6. Integrations (3rd Party)

A. 1. 0

2. 0 related to BTL. We have used 18 Flows for BTL.

3. 0 related to BTL.

4. The custom objects schema related to BTL has already been shared in the RFP Q&A.

5. 1 installed non-Salesforce.org package for BTL (Formstack, as already explained)

6. 0

Q. Current test coverage %, and number of failure test classes

A. There is no Apex used in the environment for BTL currently.

Q. Can we have number of records for each majorly (high impacted) objects in org for both programs

A. The highest volume object is Work Order Items. There are currently ~1150. The second highest is Work Order, of which there are ~375.

Q. Can we have number of fields for each majorly (high impacted) objects in org

A. The object with the most fields is the BTL application object, with just under 200 fields, not all of which are in active use. The Work Order and Work Order Items have ~20 fields each and other items are of similar size, with slightly more fields on the opportunity object of BTL record type.



Q. Any data sync running in real/scheduled time for either of the program

A. There are not currently external data syncs. Imports are done via Dataloader.

Q. Do you have any existing Salesforce service provider or in-house expertise?

A. We have a resource with Salesforce experience internally. We do not have an existing service provider.

Q. Is there a different business process or rules for each type of property (resident, commercial and more) or everything is same across all types of properties

A. We only service residential properties in Built to Last.

Q. For all coordination between the partners for repairs is that being handled in Salesforce or everything is out of Salesforce and is manually process?

A. Coordination is done in Salesforce where possible, but partner compliance with this could be improved.

Q. When was formstack implemented, and is that being supported by internal resources or formstack team does the support?

A. Formstack was installed between 2017-2019, but exact dates are uncertain. When an issue arises, Formstack support is contacted to resolve the issue.

Q. On an average, how many form submission takes place everyday?

A. During the BTL intake phase, we are estimating an initial average of 20 submissions per week, ramping up over time. The Solarize program averages 2-5 submissions per day, but experiences spikes of new leads. However, this is not part of the RFP process.



Q. Lead Conversion process, is this the standard salesforce process, or customized for the business?

A. We are using the standard Salesforce lead conversion process for Solarize Philly but this is not relevant to Built to Last.

Q. Customer Satisfaction Survey, is that being implemented using formstack only or any custom UI components is being used for the same

A. BTL's surveys are currently being done via a Formstack form feeding into a custom object.

Q. Confirmation required - You are using Salesforce Sites/Experience cloud for partner community?

A. Yes.

Q. Are we planning to clean and remove legacy objects and records from the system to decrease the techdebt?

A. This is recommended.

Q. Are all objective will go hand in hand or based on the priorities, this are going to implemented?

A. Some of the objectives will continue to be higher priority than others and where possible, those with the biggest impact should be implemented first.

Q. Are you planning to take any further actions or based on the status of the tasks?

A. Yes, actions may be taken based on task status. For example, if an estimate has been pending for a given period of time, we may need to follow up with a subcontractor.



Q. Monitoring process is just for the Construction Manager or in future, additional personas can be added with different OKR?

A. In general, while maintaining client privacy, we want all relevant partners to be able to review the status of work at a home, not just the construction manager. There could be additional personas in the future, such as external referral partners, that may need to see the status as well.

Q. For Documentation management, are you currently any Appexchange tool? If yes, can you please share the details

A. We are not.

Q. Is it ok if we go with built vs buy? So are you looking for customized solutions specific to the business

A. Our preference is not to custom build when an out-of-the-box solution is adequate for our needs.