

ADDENDUM NUMBER 1

Request for Proposal: RFP# 2025-02-11-A Salesforce Support
Addendum Issue Date: Monday, February 24, 2025
RFP Closing Date & Time: Wednesday, March 5, 2024 5:00 PM ET

To All Potential Proponents:

Addendum Number 1 is issued to modify the previously issued RFP document and/or given for informational purposes and is hereby an official document of the RFP. Please attach this addendum to the original RFP package. As per the RFP, the Proponent shall acknowledge receipt of any and all addendums, if any, by listing the Addenda by number(s) and date(s) in their proposal.

Please note that certain questions have not been answered in this addendum. Answers to any outstanding or unanswered questions will be provided to the successful candidate upon the conclusion of the RFP process.

1. What is the budget for this scope of work?

Ans. In accordance with our procurement guidelines, we do not share the project budget.

2. Is there a requirement to register or use the Merx system for this procurement?

Ans. No, please send proposals by email to procurement@accesemployment.ca.

3. How long ago did you implement Salesforce?

In 2016.

4. Could you please provide insights into the size and complexity of your Salesforce organization, including the number of users, active Salesforce modules, and customizations? How many Salesforce users would we be supporting? Are all users internal or are there any external users?

Ans. Our Salesforce organization has approximately 200 internal users. There are several installed packages for Salesforce, integrations include but are not limited to SurveyMonkey, DocuSign, Zoom, and Salesforce Inbox for Outlook.

- 5. What type of Salesforce cloud is being used by ACCES Employment? Is it the Non-profit or another solution? Additionally, which edition of Salesforce is currently in use? Do you have any code related activities in Marketing Cloud now? E.g. Apex code, LWC, Aura etc**

Ans. ACCES Employment uses Sales and Service cloud with the Unlimited Edition for Salesforce and does not have the Nonprofit Success Pack (NPSP) installed. There are 10 Marketing related Apex classes set up for our organization currently.

- 6. Which ACCES Employment external or legacy applications are currently integrated with Salesforce? Are there plans for future integrations of systems?**

Ans. Integrations are outlined in the RFP. Future integrations depend on the business needs.

- 7. Do you currently leverage an iPaaS or are all integrations point to point?**

Ans. Integrations are generally point-to-point.

- 8. Can ACCES Employment confirm that the application stack for the support and enhancement is just for the Salesforce Application, or it should cover the other applications also as mentioned under the Section 2.1 (Zoom, TalentLMS, IBM Watson and the integration?**

Ans. Only support for the Salesforce application and Marketing Cloud Account Engagement is expected. Some integrations may require support from the vendor if the vendor implemented them as part of an enhancement. Other integrations are listed so that vendors are aware of the potential complexities of the application stack.

- 9. Is ACCES Employment going to take care of the L1 support (Business Request Support) and is ACCES looking for the proponent to work on the L2 (Technical Salesforce Support) and L3 support (Salesforce Enhancement) instances? Can ACCES Employment confirm if they are looking for Staff Augmentation on demand or a dedicated production support team (Support + Enhancement)?**

Ans. ACCES Employment will perform L1 support (Business Request Support), as well as some L2 (Technical Salesforce Support) within its expertise, although vendors should be expected to assist ACCES with L2 support in some cases. L3 support shall be provided by vendors in collaboration with ACCES' internal team. We are generally seeking a dedicated production support team (support + enhancements).

10. Regarding feature enhancements and development, would ACCES prefer a dedicated team separate from the support team to handle these tasks? Or would ACCES prefer that feature enhancements be managed by the L3 support team as part of their responsibilities?

Ans. ACCES is flexible in terms of the resources performing the work, so long as the deliverables are met and the same quality of output is achieved.

11. How many team members are you looking for?

Ans. There is no set target amount of team members that we are looking for. Team size and composition depends on the type of ad hoc support and/or project work required.

12. The scope of work includes bi-weekly meetings. Can we change that to weekly meetings instead?

Ans. Yes, but we will evaluate the frequency as needed.

13. Which tool will be used to track consumed hours, and what is the procedure for calculating them?

Ans. Work hours consumed/remaining are tracked on a weekly basis. We are open to any tool that provides shared visibility for both ACCES' internal team and the vendor.

14. Is the sole expectation for pricing an hourly rate? Should we provide a single blended hourly rate for all resources (e.g., Consultant, Developer, Administrator, etc.) or only the hourly rate for support personnel, assuming Appendix E is designated for support? Alternatively, would it be preferable to list multiple lines for each resource involved in the project?

Ans. We prefer the hourly rate for support personnel. Rates could differ depending on the resource performing the work (e.g. project manager vs. Salesforce developer).

15. Do you have a target baseline commitment for an annual number of hours for support between project and ad-hoc? Are you amenable to a single "bank" of hours purchased for the year? What is the approximate number of hours you would like to use / budget if using a monthly time "bank"? Will ACCES be providing a minimum commitment of support hours per month or per year?

Ans. There is no target baseline commitment for an annual number of hours. We are amenable to a time "bank" of hours purchased for the year, paid on a monthly basis.

16. How frequently does ACCES expect to review or adjust the number of ad hoc hours needed?

Ans. Review of hours consumed/remaining is performed on a weekly basis.

17. What is your current development cycle, i.e. Kanban/SCRUM/Waterfall and what is the current development to production process? How often are deployments?

Ans. ACCES Employment utilizes a Kanban board via Trello, and generally waterfall deployment methodology. Vendors should maintain their own sandbox for development. Deployments are then delivered to ACCES' staging (non-production) instance of Salesforce, and once successfully tested delivered to the production environment. Deployments occur as needed for various projects; there is no predefined deployment cadence.

18. What tools are currently in use for ticket management, user story generation, change management, production incidents and delivery?

Ans. ACCES Employment utilizes Trello for ticket (card) management.

19. What are the preferred channels for communication and reporting on support issues (e.g., email, phone, ticketing system)?

Ans. Issues should be logged in ACCES Employment's ticketing system (Trello). Email and phone conversations (Teams) will occur depending on criticality of the issue.

20. If major functionality is getting impacted due to an integration issue, is the vendor responsible for repairing the issue?

Ans. If the issue is related to an integration with third-party software, and the third-party software itself is experiencing the issue, it is not the responsibility of the vendor to provide support. The vendor is responsible for any support that may rectify the issue on the Salesforce side only.

21. Do you expect us to provide resources who are proficient in IBM Watson development?

Ans. No, however, proponents should outline if they have that knowledge, as it would be an asset.

22. Is there proactive monitoring and/or an alert system in place to notify support resource when critical incidents or system thresholds are reached?

Ans. ArcticWolf is implemented by ACCES' IT team for proactive monitoring of the Salesforce production instance. In addition, we receive automated notifications from Salesforce in the event that we near MCAE limits, get form submission errors, etc.

23. How do you handle escalations, and what are your expectations for escalation response times?

Ans. Escalations are raised to the internal ACCES Employment team, and action is taken accordingly. Expected response times are outlined in the RFP.

24. Are you amenable to a modified SLA that contains more levels but meets the minimum for a two hour response to Major issues?

Ans. We are open to modified SLAs that meet the stated response times as described in the RFP.

25. Is there any flexibility in the support hours (9 am-6 pm ET)?

Ans. No, we require primary support during this time period, however only critical issues will require a response between 5-6pm ET. After hours or off-hours support may be required on an as-needed basis.

26. Can ACCES provide more details about the potential need for off-hours support for planned deployments? How will off-hours support be requested, scheduled, and compensated?

Ans. Off-hours support will be conducted in mutually agreed upon estimates for the work needing to be performed. Deployments are planned in advance of the target deployment date and compensated at the vendor's offered rate agreed upon by ACCES.

27. What service level support contract does ACCES Employment have with Salesforce currently? Will we have direct access to the Salesforce's support portal, or should escalations go through your internal team?

Ans. ACCES Employment has support through Salesforce Unlimited licensing. Escalations should go through the internal team.

28. Is there a requirement that the vendor be incorporated in Canada or is USA permitted? Is ACCES Employment open to implementation and support services from offshore/nearshore or onshore? Does ACCES expect the consultants to be available in Canada or can we propose a hybrid team with a combination of onshore, nearshore, and offshore consultants? Is there a preference for a Canadian company? Will any support/implementation resources be required to work from the ACCES Employment office?

Ans. ACCES prefers onshore resources for service delivery and within the same time zone (Eastern Time). Resources are not required to work from an ACCES Employment office.

29. Is there a requirement for languages other than English?

Ans. The primary language requirement is English, but in certain cases (e.g. Salesforce forms) we may require translations. ACCES will provide any translated text.

30. Will ACCES Employment provide laptops for implementation and support? Will all services be carried out within the ACCES Employment infrastructure and/or VPN, regardless of the location from which the work is conducted?

Ans. ACCES will not provide hardware for vendors. All services will be performed on ACCES' Salesforce infrastructure and vendors may work remotely.

31. Is there an incumbent vendor(s) for these services? Do you expect to select multiple vendors for this contract, or a single partner?

Ans. There are incumbent vendors. ACCES may elect to choose a single partner, or multiple vendors as needed.

32. Can you share the current high-level objectives expected to be addressed in year one?

Ans. High-level objectives include:

- Understand ACCES' Salesforce environment and provide L2 and L3 support in collaboration with the internal team.
- Develop enhancements that support the following initiatives:
 - o Service journey visualization (visualize touchpoints completed by each client while leveraging ACCES' services)
 - o Pulling more information from Salesforce onto ACCES' website
 - o Bulk SMS capability for both marketing and transactional notifications
 - o System-based matching of clients and jobs

33. Does the project involve any data migration or cleansing activities?

Ans. In the short term, no. However, there could be future projects that involve these activities.

34. How do you define success in terms of vendor performance? Are there any specific SLAs or KPIs beyond response times?

Ans. Vendor success will be measured by, but not limited to, the following criteria:

- Delivery: Change requests completed on time
- Responsiveness: Ability to respond within agreed upon SLAs
- Innovation: Proposed and implemented system enhancements provide tangible benefit, increased ROI, cost/time savings, sustainable solution, etc.
- Quality: Error/defect rate is reduced or eliminated, rework is kept to a minimum
- Cost: Estimates are accurate for the work performed, and typically do not exceed original estimate unless change requests are agreed upon in advance
- Customer Service: Communication and collaboration with the internal ACCES team, handling of complaints, escalation, resolution

35. How often does ACCES expect to receive reports on support performance and SLAs?

Ans. Weekly reports of hours consumed/remaining are expected. Overall performance reports are expected on a monthly basis.

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