

**Request for Proposals: #2020 – 001
Salesforce Migration and Integration
Questions and Answers**

1. What is the budget?
 - a) The budget will be determined based on the ability of the vendor to execute on items outlined in the RFP.

2. Is a demo required for the partner? Salesforce usually performs the demos.
 - a) EmployIndy has been working directly with Salesforce.org to scope our desired state and this is the project plan and direction we have jointly devised to move forward. While not required, a demo is strongly encouraged and partners able to provide a demo or workflow visualization prototype are more likely to demonstrate ability to execute on the deliverables.

3. Would EmployIndy consider a short extension of the response due date because of the hard copy submission requirement?
 - a) The deadline for written proposals is firm. The schedule allows time to further define some specifics of your proposal between the narrative and presentations. EmployIndy will consider allowing more time for the demo and presentation scheduling.

4. How many users are expected to use this new Salesforce instance?
 - a) There are currently 52 employees at EmployIndy and all employees are intended to use Salesforce. Additionally, some contracted entities will also be required to use Salesforce.

5. What is the potential number of users?
 - a) Please see the answer to question number 4.

6. Is there any categorization or classification of user roles or services that exist currently?
 - a) Yes, there are current separations in views based on role groups.

7. Will data be required to flow outside of the new Salesforce instance to other systems (internal and external?)
 - a) Yes, data will ultimately need to flow to the EmployIndy Data warehouse. While this does not have to be executed during the initial project, it is vital to build the system with this perspective.

8. It is mentioned that a third party is supporting the existing instance for customizations and support. Can you please share who is currently doing this?



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- a) Because we were on a shared instance, the selection of the implementation partner was out of our control.
9. What is the estimated budget of this project?
 - a) Please see the answer to question number 1.
 10. Do you have any preference to the timeline? When do you want to see the system go live?
 - a) The timeline is negotiable and should reflect the appropriate length of time to execute the desired results of the RFP.
 11. How long has EmployIndy been running the first instance of Salesforce?
 - a) EmployIndy started using our current Salesforce instance in 2017.
 12. Since its adoption, what percentage of end-users use the system on a regular basis?
 - a) About 20% of the organization uses Salesforce in their day-to-day activities. These users are primarily in Business Solutions, Contracting, and Finance. Moving forward, 100% of the organization is expected to become regular users.
 13. Who is responsible for Salesforce maintenance or data management (i.e., do you have a Salesforce Admin or data manager?)
 - a) We do not have a dedicated Salesforce Admin or Data manager to the system. EmployIndy would welcome recommendations regarding the needs to support the system.
 14. Is there a distinction in data between EmployIndy and the Indy Chamber within the Salesforce instance?
 - a) Yes, but only by ownership of account and tagging of specific accounts.
 15. What additional software and tools does EmployIndy want to integrate into this instance?
 - a) Pactsafe and FinancialEdge (a BlackBaud product).
 16. How much data do you have that is not in an automated format (i.e., needs to be manually entered?)
 - a) The majority of data is manual entry with the exception of contracts which are generated in and completed via Pactsafe.



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17. Will an on-site presence be required to complete the project? If so, what percentage?
 - a) There is no set amount of time that is needed on site. It is preferable to have a mixture of on-site and remote work.

18. What is the expected turn around time for completion of the project, including staff training?
 - a) Please see answer to question number 10.

19. Is it expected that the demo be submitted with the proposal or afterwards?
 - a) The demonstration will be by invite only after review of the submitted proposals.

20. How many end-users will use the platform?
 - a) Please see the answer to question number 5.

21. Will each end-user require their own license (log-in) or will teams/departments have specific profiles/roles?
 - a) Both. Each end-user will require their own log-in to enter data and teams/departments will also need to be assigned profiles and roles.

22. Is it expected that the demonstration be a prototype of EmployIndy's proposed instance, or instead an example of similar work completed by the bidder?
 - a) It is preferred to have a demonstration of the prototype for EmployIndy's proposed instance.

23. What is EmployIndy's budget for this project?
 - a) Please see the answer to question number 1.

24. Considering the uncertainties and variables associated to this project, will the contract be negotiated as a fixed cost, pool of billable hours, or another fee structure?
 - a) The contract will be on a cost reimbursement basis dependent upon the costs associated with the timeline and the deliverables defined in the scope of work.

25. What is the current process map or technical footprint for the existing instance?
 - a) There is no current process map as we are on a shared instance. Additionally, in regard to the technical footprint there is precise way to determine the technical footprint.

26. Will bidders have access to a Salesforce Org that has the requested demo requirements?
 - a) Bidders are expected to provide demonstrations in Salesforce Orgs or other means to demonstrate ability to capture and visualize data as detailed by the RFP. EmployIndy will not provide access to their current Salesforce instance for the demonstration.



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27. Is a detailed list of integrations available regarding third party software and the direction of the data flow (one way or both ways), as well as the sync frequency (real time, number of batches per day?)
 - a) Please refer to the use case for third party software. Data flow diagrams are not available but there is currently no batch data ran daily.

28. Should we include license costs with our estimate or just labor?
 - a) Please include both license and labor costs in your budget.

29. Would EmployIndy provide details on the indemnification and insurance requirements?
 - a) The Contractor agrees to indemnify, defend and hold harmless EmployIndy, its agents, officials, and employees from all claims and suites including court costs, attorney's fees, and other expenses caused by any act or omission of the Contractor and/or its subcontractors, if any, in the performance of the Services under this Contract. EmployIndy shall not provide such indemnification to the Contractor.
 - b) An Errors and Omissions policy will be required.

30. Is there a deadline for when EmployIndy needs to be migrated off of the Indy Chamber Salesforce org?
 - a) While there is no deadline, we would like to make a timely transition.

31. Will EmployIndy have a dedicated Product Owner/decision maker for this project?
 - a) Yes

32. Will EmployIndy utilize the new Salesforce Org for donation and moves management?
 - a) Not at this time but it is possible for a future iteration.

33. Does EmployIndy consider tender participants that are based in Ukraine or do you consider US candidates?
 - a) Because of the nature of the project, EmployIndy prefers to have someone who can be onsite on a regular basis throughout the length of the project.