VRA VIRGINIA RESOURCES AUTHORITY

Salesforce Implementation and Consulting RFP, Addendum #1: Questions & Answers

October 31, 2024

Material RFP-related inquiries received on or before October 30, 2024 are listed below along with VRA's response. The deadline for questions has now passed and proposals are due on November 22, 2024 as detailed in the RFP.

1. *How many Salesforce licenses are you looking to procure?*
   a. We plan to purchase 10 licenses to start but may go up to 15.

2. *Are the following forms mandatory for participation: State Corporation Commission Form (Attachment B), SWaM Qualification Form (Attachment C), IRS Form W-9?*
   a. These forms are a required component of your submission and must be included with your response.

3. *Section 5.1. of the RFP (Offeror's Minimum Qualifications), mentions that the "Offeror shall have at least five (5) years' experience in providing similar services to comparable public bodies." We would like to reconfirm the intent/ meaning of "comparable Public Bodies". Does it relate to credentials/ work done only for government agencies?*
   a. Yes, the "comparable public bodies" phrase requires that your firm have experience working with governmental agencies.

4. *Should we set up continuous integration between the loan servicing software and Salesforce, or is a one-time export and import of data sufficient?*
   a. We do not need an integration between Salesforce and our loan servicing software.

5. *Are you currently using any email communication tools for sending emails or tracking interactions?*
   a. VRA uses Microsoft Outlook.

6. *Are we storing prospect documents in Google Drive or another platform that needs to be linked to Salesforce?*
   a. No integration to document storage will be needed.

7. *Is there a breakdown of the $125,000 budget by area (e.g., implementation, training, support)?*
   a. The $125,000 budget would include initial implementation and training prior to go-live. We'd anticipate a separate fee for ongoing support.

8. *Do you have a preferred go-live date or specific milestone deadlines for this project?*
   a. Ideally by June 30, 2025 but this is a preference, not a requirement.

9. *Which business processes are top priorities for automation in Salesforce?*
    a. See Attachment D (page 17) of the RFP for a listing of goals. We would expect Goal 3 to have the most automation, but will rely on our implementation partner to assist in business process mapping to determine the best approach for automation.

10. *Who will be the primary stakeholders involved during implementation, and what level of engagement should we expect?*
    a. The internal VRA team will be the primary stakeholders and will be fully engaged in the process.

11. *Could you share details on data sources and any anticipated challenges with migration?*
    a. Most data sources can be exported to Microsoft Excel. The primary data would be contact information and a listing of current loans in the pipeline.

12. *Beyond loan servicing software, are there other systems needing integration with Salesforce?*
    a. We do not need an integration between Salesforce and our loan servicing software.

13. *Are there particular security or compliance requirements we should know for this implementation?*
    a. None

14. *What level of support is expected post-implementation, and do you have specific SLAs in mind?*
    a. We do not have specific SLA requirements – we would expect your response to detail the post-implementation support your firm would offer.

15. *How heavily will experience with public sector projects weigh in the selection process? Is there a weighted percentage for evaluation criteria?*
    a. Public sector experience is not a separate evaluation criteria but a minimum qualification requirement. Experience and professional qualifications are up to 25 points out of a 100 point scale as detailed in Section 7.0.

16. *Are there plans to expand the use of Salesforce across additional departments or functionalities?*
    a. We have discussed providing an external portal to our borrowers as a future project, but that is not within the scope of this RFP.

17. *What are the key business objectives that VRA would like to achieve by implementing Salesforce.com? What important metrics of the current process that VRA would like to improve with Salesforce.com?*
    a. Our project goals are detailed in Attachment D on page 17.

18. *The Salesforce.com implementation is a green-field project. Please explain the plan VRA has for change management, core team and Salesforce environment setups.*
    a. VRA would rely on the selected implementor for ongoing support, including change management.

19. *What is the expected number of users of the Salesforce system?*
    a. We plan to purchase 10 licenses to start but may go up to 15.

20. *What is the tentative timeline budgeted by which VRA would like to have the Salesforce.com solution up and running?*
    a. Ideally by June 30, 2025 but this is a preference, not a requirement.

21. *The Contract shall have an initial term of one (1) year. Please clarify on the start date of the contract (contract sign off date, project initiation date, implementation start date).*
    a. We anticipate the contract beginning on or around January 1, 2025. Exact timing will depend on the time it takes to complete the full procurement process.

22. *As VRA currently does not use any CRM system, in what form is the data currently maintained? How many years of data needs to be migrated? Is there any data in physical form that will need converted to digital to be migrated?*
    a. Most data sources can be exported to Microsoft Excel. The primary data would be contact information and a listing of current loans in the pipeline. There is no physical data that needs to be converted to digital.

23. *It is mentioned that data is stored in multiple locations. Could you provide more details about these locations and the type of data stored in each?*
    a. Contact data is stored on multiple spreadsheets, Constant Contact, and our loan servicing system (can be exported to Excel). Loan pipeline data is stored in Excel.

24. *We understand that you have existing software for servicing loans and, for marketing purposes, you use Constant Contact. Do we have plans for integrating Salesforce with these platforms, or do you want to manage everything within Salesforce?*
    a. We intend to keep the loan servicing system separate from Salesforce with no integration. We are open to replacing Constant Contact if Salesforce can provide similar functionality, but we only use it for basic contact storage and very small email campaigns.

25. *If the goal is to manage everything within Salesforce, are there plans to purchase Salesforce Financial Service Cloud and Marketing Cloud for loan servicing and marketing?*
    a. We do not intend to manage the loan servicing portion within Salesforce. We have reviewed Financial Services Cloud and do not feel it is a good fit for our use case.

26. *For marketing or notifying customers, do you have plans to use WhatsApp, SMS, or any other channels apart from emails?*
    a. No

27. *You mentioned that email communications are siloed and want to send all emails from Salesforce. Salesforce Einstein Activity Capture can automate email and calendar event logging in Salesforce, even when sent from the organization's mailbox (Google Workspace or Microsoft 365), reducing manual entry errors. Additional licenses may be required depending on the Salesforce edition. Are you interested in procuring Salesforce Einstein Activity Capture?*
    a. We have reviewed Einstein Activity Capture and do not feel it is a good fit for our use case.

28. *For phone calls, are there any plans to integrate a CTI solution within Salesforce to allow calls to be made from Salesforce, with logs auto-logged?*
    a. We do not feel that auto-logging phone calls is necessary.

29. *You mentioned the challenge of maintaining consistent documentation with a staff of 15. Do you have any existing guidelines or processes for documentation? Which types of documents (e.g., Technical Document, Test Case Document, API Document) do you expect as deliverables at the end of the project?*
    a. We do not have any existing documentation since we do not have an existing CRM. We would rely on the implementor to assist us in coming up with best practices to distribute to our staff.

30. *Salesforce Financial Services Cloud is designed to enhance the operational efficiency of financial organizations. Please note that licenses for this product must be purchased separately. Are you interested in managing loans using Opportunities in Sales Cloud, or would you prefer to acquire a dedicated Financial Services Cloud license?*
    a. We plan to use Opportunities within Sales Cloud to manage the pipeline of loans. We have reviewed Financial Services Cloud and do not feel it is a good fit for our use case.

31. *Could you clarify which specific objectives or features within Salesforce are the highest priority for VRA? For example, is consolidating contact information more critical than automating workflows?*
    a. Our project goals are detailed in Attachment D on page 17. All three goals must be met with initial implementation.

32. *Are there any "must-have" versus "nice-to-have" features within the implementation scope?*
    a. Our project goals are detailed in Attachment D on page 17. All three goals must be met with initial implementation.

33. *Who will be the main point of contact for project oversight and decision-making on VRA's side? Are there specific stakeholders we should consider during planning or design stages?*
    a. Curtis Doughtie, VRA's Director of Finance and Administration will be the primary contact. The internal VRA team will be the primary stakeholders and will be fully engaged in the process.

34. *Will key stakeholders be available for periodic reviews or decision checkpoints?*
    a. Yes

35. *Given the budget of $125,000, are there any specific areas where you anticipate budgetary constraints or where cost efficiency is preferred?*
    a. No

36. *What is the geographic spread of the current users?*
    a. All users are in VRA's office in Richmond, Virginia.

37. *Is Salesforce application on Classic interface or on Lightning Interface?*
    a. We do not currently use Salesforce. We would anticipate using the Lightning Interface.

38. *How many enhancement requests are done on monthly basis?*
    a. This is unknown as we do not currently use Salesforce.

39. *What all are the key modules within Sales cloud/Service cloud/Marketing Clouds/Community Cloud used by the end-users in Salesforce ecosystem?*
    a. This is unknown as we do not currently use Salesforce.

40. *How many new users are expected be on-boarded on salesforce ecosystem on Y-o-Y basis?*
    a. We are not anticipating any material user growth, however we may have natural turnover of 1-2 users per year.

41. *Can a developers work from anywhere globally and remotely?*
    a. There is no location requirement for developers. We anticipate most, if not all of the project to be completed remotely.

42. *Can H1 worker work on the project?*
    a. There is no restriction on individual workers.

43. *What are the different license types procured? If any*
    a. VRA has not purchased any licenses yet.

44. *Are there anticipated add-ons or customization that would require further budget allocation?*
    a. No

45. *Could you provide more detailed examples of the reporting and dashboard requirements, particularly around loan pipelines and borrower interactions?*
    a. This is difficult to provide details around because we do not currently use Salesforce. We don't anticipate a significant number of custom reports or dashboards.

46. *Could you clarify the type and volume of data to be migrated, as well as its current format or system?*
    a. All data sources can be provided in Microsoft Excel. The primary data would be contact information and a listing of current loans in the pipeline. There is no physical data that needs to be converted to digital. There are approximately 350 organizations and 450 individual contacts.

47. *Do you have existing data quality standards or any known data issues (duplicates, inaccuracies) we should consider during migration?*
    a. We do not have any known data issues. VRA staff will check the data for duplicates before migration.

48. *How many types of user roles will need to be configured, and are there specific permissions or access controls required for different groups within VRA?*
    a. We would expect 3-5 user roles would be sufficient.

49. *Will there be external users (partners, contractors, etc.) accessing the system, or only internal users?*
    a. Only internal users. We have discussed providing an external portal to our borrowers as a future project, but that is not within the scope of this RFP.

50. *Could you clarify the intended user training scope? For instance, will training be required for basic functionality only, or also for administrative capabilities within Salesforce?*
    a. Both.

51. *Do you have a preference for training formats (in-person, virtual, recorded sessions) or materials (manuals, interactive guides)?*
    a. Some interactive training up front would be helpful, along with written materials for future reference.

52. *Are there specific expectations for the duration and nature of post-deployment support (e.g., weekly check-ins, as-needed troubleshooting)?*
    a. No specific expectations.

53. *Would you like ongoing support to include training for new Salesforce features, or only support for the features implemented?*
    a. Ongoing support should include training for features that we implement, not just all new Salesforce features.

54. *How many support cases (by category (severity)) do you average a month?*
    a. This is difficult to provide details around because we do not currently use Salesforce.

55. *In which specific document we need to maintain consistency and share it among the staff members ?*
    a. We will need to set some parameters around which types of interactions and data get loaded into Salesforce in order to be consistent across all users.

56. *What kind of data do we need to search within documents ?*
    a. All text within attached Microsoft Word, Excel or PDF documents should be searchable.

57. *Is loan servicing software custom made or any third party software ?*
    a. Third party

58. *What is the difference between organization and individual contacts?*
    a. An organization may have multiple individual contacts. For example, a County may have one contact that is used for all contact by VRA while another County may have separate contacts for VRA's Accounting, Compliance, and Program teams.

59. *What will be the business process to filter specific data points to store in the system*
    a. This will be determined by the VRA team, with assistance from the implementation team, to determine best practices around what gets stored within Salesforce.

60. *Currently how are you managing the closing calendar ?*
    a. Microsoft Excel

61. *What do you mean by challenges to find interactions after employee turnover ?*
    a. Most of our interactions with borrowers are within email. When there is employee turnover and we need to reference historical interactions, we have to manually search the person's old inbox.

62. *Are you thinking of migrating to the salesforce Phone call feature or will you be continuing to the same process?*
    a. We do not feel that auto-logging phone calls is necessary.

63. *Are there approval processes involved for closing the calendar?*
    a. The closing calendar is just a listing of all loans in the pipeline. Each loan closing has its own requirements, which may differ depending on the loan program.

64. *What response time SLAs are you looking for (again, by category)?*
    a. We do not have specific SLA requirements – we would expect your response to detail the post-implementation support your firm would offer.

65. *Are there any reporting formats required for project status reports? If so, may we have an example?*
    a. This is difficult to provide details around because we do not currently use Salesforce. We don't anticipate a significant number of custom reports or dashboards.

66. *Is there a desired timeline or any critical milestones we need to meet within each phase (planning, design, testing, deployment)?*
    a. Ideally we would be implemented by June 30, 2025 but this is a preference, not a requirement.

67. *Are there any specific project dependencies, such as input from other departments or systems, that could impact the timeline?*
    a. No

68. *Could you elaborate on any specific testing standards or acceptance criteria VRA requires before each project phase is considered complete?*
    a. No specific testing standards or acceptance criteria.

69. *Is there an internal team that will conduct or review User Acceptance Testing, or will we be solely responsible for this process?*
    a. We anticipate this being a joint process with VRA users and the implementation team.

70. *Are there any known future integrations or enhancements you envision post-implementation, which we should plan for in the initial configuration?*
    a. No known future integrations.

71. *How does VRA see its Salesforce use evolving over the next 3-5 years?*
    a. We have discussed providing an external portal to our borrowers as a future project, but that is not within the scope of this RFP.

72. *What level of documentation detail does VRA require? Would you prefer a full implementation guide, or will high-level documentation suffice?*
    a. No preference

73. *Are there any specific reporting templates or metrics we should consider for the project's progress reports?*
    a. No specific reporting requirements

74. *Are there any data security, compliance, or regulatory standards (e.g., data privacy) we should be aware of when designing and implementing the Salesforce solution?*
    a. No

75. *Would you require any certifications or compliance documentation from our team related to data handling?*
    a. No

76. *Are there any data retention policies that we need to be aware of? If so, what are they?*
    a. We keep loan related records for three years after the loan is fully paid off.

77. *Can you describe your existing Technical infrastructure and Applications – e.g., email, phone system, Security requirements?*
    a. VRA uses Microsoft Outlook for email. There are no other integrations required. There are no specific security requirements.

78. *Can you describe the expected amount and types of historical data migration that will need to be imported into the new Salesforce CRM solution – e.g., Accounts, Contacts, Activities, Loan Contracts, documents, etc.?*
    a. There are approximately 350 organizations (Accounts) and 450 individual contacts.

79. *Can you provide an estimate of the number of users this CRM solution will support – internal and external -- and whether they will be full-time users or 'occasional' users?*
    a. We plan to purchase 10 licenses to start but may go up to 15, all for internal users. They will all be full-time users.

80. *Can you provide examples of the Users' Roles – e.g., Finance, Underwriting, Customer Service, etc.?*
    a. We would expect 3-5 user roles would be sufficient.

81. *Will external Partner users be given access to the CRM solution and, if so, will they be provided single user licenses or would you consider Experience Cloud licenses for external users?*
    a. No external users.

82. *Can you describe the Business Processes that you expect to be addressed as part of this CRM solution's design – e.g., Lead Management, Application Management, Payment Collections, Marketing, etc.?*
    a. Contact and opportunity management.

83. *Do you intend to track Loan Payments with this new CRM Solution?*
    a. No

84. *Can the Project Team work remotely or will any of the Project work need to be performed on-site – e.g., Training?*
    a. We anticipate most, if not all of the project to be completed remotely.

85. *Will you allow off-shore resources to be part of the Project Team led by US-based, on-shore resources?*
    a. There is no location requirement for developers.

86. *When do you expect to make a Vendor selection?*
    a. December 2024.

87. *When do you expect the Project to start?*
    a. Assuming finalization of vendor selection and contract in December 2024, we would expect work to start in January 2025.

88. *What will the required working days/hours for Supporting the new CRM solution?*
    a. Support should be available during VRA's business hours: 8:30am-5:00pm, Monday-Friday.

89. *How many internal users will need access to Salesforce?*
    a. We plan to purchase 10 licenses to start but may go up to 15.

90. *This RFP touches on the process of tracking contacts, correspondence and communication with agency partners. It also talks about sharing interactions with current and prospective borrowers and developing a better way to collect metrics on project movement. Is there interest in providing external users (partnering agencies, borrowers etc.) with limited direct access to the system? If so, approximately how many users would this be or what anticipated volume of access (logging in per year) might they need?*
    a. We have discussed providing an external portal to our borrowers as a future project, but that is not within the scope of this RFP.

91. *What is your timeline for purchasing the licenses and the go-live date?*
    a. We hope to begin implementation in January 2025 and go-live in June 2025, but there is flexibility there.

92. *What is your license budget?*
    a. We have an amount budgeted to cover up to 15 licenses of Enterprise Sales Cloud.

93. *Please confirm for which all project data migration is needed? Do we need to migrate the data for projects which are on progress or on-going loans?*
    a. Only in-progress loans will need to be migrated.

94. *Who are the target users of the system?*
    a. Internal VRA staff

95. *What is Constant contact?*
    a. Constant Contact is an email marketing platform.

96. *Does it have to Sales cloud only or open for using Financial Service Cloud if it's a better fit?*
   a. We have reviewed Financial Services Cloud and do not feel it is a good fit for our use case.

97. *Will the requirement gathering happen in person or over teams/zoom?*
   a. We anticipate most, if not all of the project to be completed remotely.

98. *Any expectations in terms of location of the team?*
   a. There is no location requirement for developers.

99. *Is consortium or joint venture allowed?*
   a. Yes

100. *Where does the Contact data reside currently?*
   a. Contact data is stored on multiple spreadsheets, Constant Contact, and our loan servicing system (can be exported to Excel).

101. *What is loan servicing software and how does it support data export?*
   a. Our loan servicing software is the accounting software we use to track loan payments after loans are closed. Data can be exported via Excel.

102. *Does it mean that data needs to be manually entered in the new system and no migration needed, please clarify?*
   a. Data can be exported to Excel. No integration is anticipated.

103. *We assume contact information would come from loan servicing software, multiple contact spreadsheets, Constant Contact and would be entered manually into the new system. Please confirm.*
   a. Manual entry or import, the data will be available in Excel.

104. *Is this the ability to the admin to classify these contacts by having addition fields with type for each?*
   a. We would rely on our implementor to determine the best way within Salesforce to accomplish this.

105. *What are the user types and their possible actions and permission? e.g. ability to read, read & right etc.*
   a. This is difficult to know since we do not currently use Salesforce. We would expect 3-5 user roles would be sufficient.

106. *How do you centralize management? – please elaborate.*
   a. We anticipate Salesforce will become our centralized source of information vs. multiple different systems and spreadsheets.

107. *Is the changes to contact expected to flow out to external system? If so, is it contact information only or anything else also needs to be included?*
    a. We do not have a high volume of change, so we are not seeking any integration. We would expect a change report or other method to identify contact changes within Salesforce for a given period of time; this report could then be used to manually update other systems. We're open to whatever solution makes the most sense here.

108. *Under Data Sources what falls under "Written correspondence"? Emails? Anything else?*
    a. PDFs of memos sent via email or hard copy.

109. *Search for data within a document, what document is being referred here? Is it search within the document or any document with matching keyword?*
    a. All text within attached Microsoft Word, Excel or PDF documents should be searchable.

110. *What are the different stages of the project? Who all have the permission to change the project status?*
    a. Pipeline stages may vary depending on the loan program. An example of the stages may be: Application, Authorization, Underwriting, Credit Approval, Pre-Closing, Post-Closing

111. *Organize opportunities for long-term prospects: does opportunity here means upcoming projects where VRA can give loans? What all is expected as part of organize? Please elaborate?*
    a. We anticipate using Opportunities as a way to organize this data; its currently only accessible via email, shared file storage, and a tracking spreadsheet.

112. *Separate pipelines for each loan and grant program (may have some overlap), Please elaborate more on the pipeline requirement.*
    a. We need the ability to setup multiple pipeline stages that vary depending on the loan/grant program. Refer to question 110 above: grant programs would not need the Underwriting stage since there is no underwriting needed on a grant.

113. *Could VRA clarify the expected process for managing data changes across various sources, including loan servicing software and Constant Contact?*
    a. We expect to make Salesforce the primary source of data, then have a way to note any changes that can then be made in the other platforms. See question 107 above.

114. *Are there specific workflows VRA considers high priority for automation within Salesforce, particularly for loan management?*
    a. We're relying on our implementation partner to help us review business processes and determine what makes sense to automate in Salesforce.

115. *Could VRA provide examples of essential reports or dashboards required for monitoring the loan pipeline and borrower interactions?*
    a. This is difficult to provide details around because we do not currently use Salesforce. We don't anticipate a significant number of custom reports or dashboards.

116. *Is there an existing structure for loan stages, or should the contractor define these as part of the system configuration?*
    a. This will be provided by VRA as part of the business process analysis. Also see question 110 above.

117. *Are there specific usability requirements VRA envisions for managing interactions and tracking borrower activities?*
    a. We need the ability to attach emails, PDFs, Word and Excel documents, as well as a place to make notes or enter phone calls. It appears the standard functionality within Salesforce can accommodate this.

118. Should the budget primarily focus on foundational elements like data migration and workflow automation, or are additional customizations encouraged within the cap?
    a. This is difficult to answer without understanding the additional customizations being proposed. If your firm can deliver the foundational elements along with additional customization within the budget, this should be detailed in your proposal.

119. *Are the contractor's post-deployment support fees included in the budget, or is there a separate allocation for ongoing support?*
    a. No, we anticipate a separate fee for ongoing support. The budget will be allocated for this once the contract is finalized.

120. *Does VRA prefer milestone-based payments throughout the project phases, and if so, what milestones are considered essential?*
    a. Milestone-based payments would be preferred. The specific milestones can be negotiated.

121. *Can VRA confirm if offshore resources are allowed, or is there a strict preference for US-based team members only?*
    a. There is no location requirement for developers.

122. *Given that our organization has two comparable case studies, would additional documentation (e.g., client testimonials) be acceptable to fulfill the reference requirement?*
    a. Your firm must meet the minimum requirements to be eligible for consideration.

123. *If subcontractors are used, must they also meet the same five-year minimum experience requirement?*
    a. Yes

124. *Are there specific data quality standards or known data issues that should be addressed during migration to Salesforce?*
    a. We do not have any known data issues. VRA staff will check the data for duplicates before migration.

125. *Although no integrations are anticipated, would VRA be open to suggestions if additional integrations could improve data flow or usability?*
    a. Yes

126. *What is the anticipated number of VRA staff requiring training, and will both administrative and end-user training be necessary?*
    a. We expect 10-15 users and both administrative and end-user training will be necessary.

127. *I work with a consulting firm based in Florida that is interested in responding. Is an SCC ID number required to be awarded this contract to work with the Virgina Resources Authority?*
    a. Completion of Attachment B is required to be considered for contract award. You should review the Virginia SCC requirements for out of state entities at https://scc.virginia.gov/pages/Foreign-Business-Entities or contact the SCC directly at directly at 804-371-9733 for clarification

128. *You mention that Salesforce Sales Cloud is the best CRM fit for your organization. What other Salesforce licenses or products do you plan to purchase, if any?*
    a. We do not plan to purchase any other licenses or products. This was more of a reference to the fact that we demoed and participated in trials of several CRM systems and different versions of Salesforce prior to issuing the RFP.

129. *Under data migration, you mention that you don't anticipate any integration needs. Is that meant to imply that you don't anticipate any data migration needs, either? Do you anticipate that data from existing spreadsheets will be entered manually? If not, could you provide data volumes for other data items beyond Organizations and Individuals (e.g., loans, projects, etc.)?*
    a. We know that contact information can be imported into Salesforce but are not sure of what other data types can be imported vs. manual entry. We have about 200 loans/projects currently in our pipeline.

130. *You reference that you want to classify contacts by type. Could you elaborate on the reason for this? And can contacts be in more than one type? Do they ever change type?*
    a. An organization may have multiple individual contacts. For example, a County may have one contact that is used for all contact by VRA while another County may have separate contacts for VRA's Accounting, Compliance, and Program teams. A contact can have more than one type and they do sometimes change type.

131. *You ask about data changes flowing to external systems. But in Section 3.0 Scope of Services, you mention that you do not anticipate any integration needs. Do you anticipate this being swivel chair tasks? Or perhaps exports and imports?*
    a. We do not have a high volume of change, so we are not seeking any integration. We would expect a change report or some other method to identify contact changes within Salesforce for a given period of time; this report could then be used to manually update other systems. We're open to whatever solution makes the most sense here.

132. *You mention searching for data within a document. Can you elaborate on the use case for this and whether you're expecting Salesforce to search the content of documents uploaded to a borrower or project?*
    a. Since some of our loans are 30 year commitments, we may need to reference memos or other information collected during the initial loan closing process. We envision attaching significant correspondence to the Opportunity record within Salesforce. We'd then want the flexibility to be able to search for content within a document in the future. We've tested this during our demos of Sales Cloud and this appears to be standard functionality.

133. *You mention projects and grants in addition to loans. Can you elaborate on the full portfolio of pipeline you're hoping to track? Is it more than loans?*
    a. VRA thinks of our funding in terms of specific projects. A project may be funded with a loan, grant, or combination of both. The pipeline would be to track an individual project, while also providing data for the underlying funding source.

134. *You mention that there are too many loans to manage in Excel - could you provide volumes of how many loans you are managing at any given time?*
    a. See above, we have about 200 loans in our current pipeline.

135. *You mention that spreadsheets do not provide meaningful status - what status updates are you hoping to achieve via Salesforce?*
    a. Salesforce provides the flexibility to view status in several ways that we can't currently see in Excel – from visual "bucketing" to drilling down on a status to see what underlying tasks have/have not been completed, along with an ability to have a running history of notes.

136. *You mention "closing calendar". What is the closing calendar? Is that a one time data source or ongoing? Or is it an output of data from the system?*
    a. The closing calendar is just a listing of all loans in the pipeline. We would envision Salesforce replacing this Excel file.

137. *You mention "project status". Can you elaborate on what a project is and what you need to track? If relevant, can you elaborate on why projects don't move in a linear way and how that may impact the Salesforce system? Is the project tracking just a matter of tracking projects related to the loans you're providing and some key details about them?*
    a. See question 133 above. Overall projects would move linearly through the pipeline, but some of the underlying tasks associated with each stage may be done out of order.

138. *You mention "clearly defined stages" for the loan pipeline – are you all making progress on that on your own or will that effort need to be assumed as part of this project?*
    a. See questions 110 and 116.

139. *You mention separate pipelines for each loan and grant program and there might be overlap. Can you elaborate on what constitutes a program? What type of overlap are you implying?*
   a. Programs are different loan/grant funding sources. Each project would fall under a specific program. See questions 110 and 112 above. It may also be helpful to look at our website for more information on our program offerings: https://www.virginiaresources.gov/programs/

140. *You mention that you have reliance on outside partners. Can you share some context as it relates to this project?*
   a. In most programs, VRA partners with a state agency. The state agency administers the program (administers the policy aspects of the program, receives applications, develops funding recommendations, and provides assistance and oversight for funded projects) while VRA serves as the financial manager (underwriting and structuring loans, loan closings, making disbursements to loan recipients, collecting loan repayments). VRA may have limited ability to make business process changes because we do not control the full process from start to finish.

141. *You mention Word and Excel templates. Are these templates relevant to the Salesforce implementation? Or will they become part of the pipeline tracking process in Salesforce?*
   a. We anticipate them becoming part of the pipeline tracking process in Salesforce.

142. *Cost of Services, you mention that the fee structure shall be based upon a "fixed schedule of fees". Would you be open to a time & materials proposal based on a proposed budget and scope?*
   a. Yes, although we may need to negotiate aspects of a not-to-exceed clause.

143. *What is the expected timeline for the project's completion?*
   a. Ideally by June 30, 2025 but this is a preference, not a requirement.

144. *Are you open to a phased implementation, or do you require all components to be deployed simultaneously?*
   a. We would require all components to be deployed simultaneously.

145. *What data sources are currently being used (e.g., spreadsheets, loan servicing software, email systems)?*
   a. Those are the data sources. All data can be provided in Excel.

146. *Are there any manual processes or tools that you expect to replace with Salesforce?*
   a. We view this project as enhancing our overall efficiency vs. one-to-one replacement of manual processes.

147. *How many stages exist in your current loan processing workflow?*
    a. See question 110.

148. *Are there any processes that require approvals or complex decision-making?*
    a. None of the processes that we anticipate putting into Salesforce would require approvals.

149. *What is the current process for managing contacts, and how many records are expected to be migrated?*
    a. This is detailed in the RFP document, Attachment D.

150. *Do you need to segment contacts by type (e.g., accounting, compliance, marketing), and how should this be structured?*
    a. Yes. Some contacts may be more than one type. See question 130.

151. *Are there any known data quality issues (e.g., duplicates, missing information) that need to be addressed before migration?*
    a. We do not have any known data issues. VRA staff will check the data for duplicates before migration.

152. *Is there a priority order for data migration (e.g., contacts first, then loans)?*
    a. No

153. *Are there external systems (e.g., loan servicing software, email marketing tools like Constant Contact) that require integration with Salesforce?*
    a. No

154. *Are there specific data points or updates that need to be exchanged with these systems?*
    a. No

155. *How many user roles need to be configured in Salesforce, and what are their responsibilities (e.g., admin, loan officer, compliance officer)?*
    a. We would expect 3-5 user roles would be sufficient.

156. *How many users will be actively using Salesforce?*
    a. We plan to purchase 10 licenses to start but may go up to 15.

157. *Are there plans for additional users in the future, or will the initial implementation focus only on current staff?*
    a. Only current staff

158. *What reports are currently generated manually, and which ones do you want automated in Salesforce?*
    a. We do not have a way to generate reports on our current data.

159. *Are there any specific dashboards or visualizations that would be most useful for managing the loan pipeline?*
    a. This is difficult to provide details around because we do not currently use Salesforce. We don't anticipate a significant number of custom reports or dashboards.

160. *What key metrics are critical to monitor in real-time (e.g., loan stage progression, pending approvals, interaction frequency)?*
    a. Loan stage progression is the most important

161. *Are there specific analytics or reporting requirements for compliance or external reporting?*
    a. No

162. *What level of Salesforce familiarity do most users have (e.g., beginner, intermediate)?*
    a. Most users have never used Salesforce

163. *What level of ongoing support do you expect post-implementation (e.g., troubleshooting, feature updates)?*
    a. We do not have specific SLA requirements – we would expect your response to detail the post-implementation support your firm would offer.

164. *Are there additional features you plan to implement in the next 12-18 months (e.g., AI tools, external portal, marketing automation)?*
    a. We have discussed providing an external portal to our borrowers as a future project, but that is not within the scope of this RFP.

165. *What are the current bottlenecks in your processes, and how do you envision Salesforce addressing these challenges?*
    a. See Appendix C of the RFP document.

166. *Are there any business rules or compliance checks that need to be incorporated into Salesforce workflows to ensure proper process adherence?*
    a. No

167. *How do different teams (e.g., loan officers, compliance, marketing) interact within the current process, and how should this be replicated or improved in Salesforce?*
    a. Our underwriting teams handle the loan pipeline process. Our compliance and accounting teams would primarily use Salesforce for contact management.

168. *The Salesforce Sales Cloud is specified in the RFP, if another Salesforce cloud was determined to make more sense for the long-term scalability of the system, would the VRA be open to it?*
      a. Yes

169. *Is there a specific % of the project that should be dedicated to a SWaM? How will the scoring for this be determined?*
      a. There is no required percentage. Attachment C must be submitted with your proposal. If your firm is not SWaM certified by DSBSD and you do not plan to use DSBSD subcontractors, you will receive a score of zero for the SWaM Qualification evaluation criteria.

170. *Would the scoring for the SWaM participation be higher if the SWaM partner acted as the prime vendor?*
      a. A firm that is SWaM certified would receive full credit in the evaluation criteria. The level of credit given for the SWaM Qualification evaluation criteria for use of DSBSD-certified subcontractors shall be at the sole discretion of VRA.

171. *Is there a specific timeline as to when the project will start?*
      a. We anticipate the contract beginning on or around January 1, 2025. Exact timing will depend on the time it takes to complete the full procurement process

172. *Will this project involve a new implementation, or will it be an enhancement of an existing proof of concept?*
      a. New implementation

173. *Could you confirm if there is an incumbent vendor currently providing services related to this RFP? b) If so, could you provide details about the incumbent's role and scope?*
      a. No incumbent vendor. VRA does not currently use Salesforce in any capacity.

174. *The RFP states: "Includes workflows to automate common processes." Could you clarify the number and type of workflows that will be automated?*
      a. See Attachment D (page 17) of the RFP for a listing of goals. We would expect Goal 3 to have the most automation, but will rely on our implementation partner to assist in business process mapping to determine the best approach for automation.

175. *Will any external users have access to the system? If so, could you indicate approximately how many?*
      a. No

176. *The RFP mentions an implementation budget of $125,000.00. Does this budget also encompass Support & Maintenance, or will these services be budgeted separately?*
    a. No, we anticipate a separate fee for ongoing support. The budget will be allocated for this once the contract is finalized.

177. *Are there specific budget allocations for training, change management, and post-implementation support?*
    a. No, we anticipate a separate fee for ongoing support. The budget will be allocated for this once the contract is finalized.

178. *Is VRA open to the use of 3rd party solution that sit on top of Salesforce' Sales Cloud platform?*
    a. Yes

179. *How many levels of approvals w/ ability to update, will be needed and will there be access restrictions for levels above the 15 or so users stated in the RFP? What permissions or customizations might each level require?*
    a. We do not require complex approvals within the system. It is difficult to give specifics here since we are not currently using a CRM.

180. *Data Migration will be needed to get Organizations and Individuals in the Loan Servicing software to be available in Salesforce. Hence, can we assume data migration is needed?*
    a. Yes, data will be available in Excel.

181. *Can we also assume ongoing integration between Loan Servicing software and Salesforce to sync contacts and loan details be needed?*
    a. We do not have a high volume of change, so we are not seeking any integration. We would expect a change report or some other method to identify contact changes within Salesforce for a given period of time; this report could then be used to manually update other systems. We're open to whatever solution makes the most sense here.

182. *What are the data security and compliance requirements, and are there specific standards (such as FedRAMP or CUI) that Salesforce must meet?*
    a. No specific requirements or standards.

183. *Are there restrictions on data storage locations (such as needing data to be stored within the U.S.)?*
    a. No

184. *Who will be the key stakeholders or decision-makers throughout the project, and what will be the process for securing approvals at each stage?*
    a. Curtis Doughtie, VRA's Director of Finance and Administration will be the primary contact. The internal VRA team will be the primary stakeholders and will be fully engaged in the process.

185.   *Are there other agencies such as Small Business Administration, IRS, etc. or Virginia State departments whose approval or input will be required for compliance or data-sharing purposes?*
     a.   No

186.   *Will any advisory committees or regulatory bodies need to be involved, particularly for compliance and risk assessments?*
     a.   No

187.   *What is the anticipated level of staff involvement, and will they be available for training, testing, and feedback?*
     a.   The internal VRA team will be fully engaged in the process.

188.   *Are there existing change management policies or preferred communication strategies that should guide our user training and onboarding efforts?*
     a.   No existing policies in place

189.   *Will internal champions or a task force be assigned to support adoption, and what level of authority will they have in shaping project decisions?*
     a.   Yes, there will be a small team that will work closely with the contractor before rollout to a wider group.

190.   *Does the VRA have expectations regarding ongoing maintenance and support, such as access to a dedicated support team or after-hours help?*
     a.   We do not have specific SLA requirements – we would expect your response to detail the post-implementation support your firm would offer. Support should be available during VRA's business hours: 8:30am-5:00pm, Monday-Friday.

191.   *What level of post-launch reporting and analytics will be required, and are there compliance or auditing needs tied to these reports?*
     a.   We do not have a way to generate reports on our current data. No compliance or auditing needs tied to these reports.

192.   *Section 3.0 states that the initial contract is for a period of 1 year. Is it expected that the $125k budget is to cover the implementation of the Project and the support there after for 1 year?*
     a.   The initial budget is for implementation through go-live. We anticipate a separate fee for ongoing support.

193.   *Are there specific deadlines tied to funding, compliance, or public reporting that will affect the project timeline?*
     a.   No. Ideally we would be fully implemented by June 30, 2025 but this is a preference, not a requirement.

194. *Are there any dependencies on other government projects that could affect the timeline?*
     a. No

195. *Is there a testing and validation period or parallel run anticipated before full launch, and who will be responsible for validating requirements?*
     a. No separate testing or validation period, outside of standard user acceptance.

196. *What is the preferred format and frequency for end-user training (e.g., in-person, virtual, self-paced)?*
     a. Virtual training is fine. Some interactive training up front would be helpful, along with written materials for future reference.

197. *Are there documentation standards or formats that need to be followed for training materials and project documentation?*
     a. No

198. *Does the VRA expect continuous training resources for new employees or refresher courses for existing staff?*
     a. Ongoing support should include training for new features that we implement.

199. *What challenges or pain points are you currently facing with your existing system?*
     a. See Attachment D of the RFP document.

200. *Who will be the primary users of Salesforce in your organization (e.g., sales reps, customer service agents, marketers)?*
     a. Our underwriting teams handle the loan pipeline process. Our compliance and accounting teams would primarily use Salesforce for contact management.

201. *How many users will use the Salesforce solution?*
     a. We plan to purchase 10 licenses to start but may go up to 15.

202. *Are there any data security requirements for certain records or objects?*
     a. No

203. *What level of training will be needed for users and administrators?*
     a. Most users have never used Salesforce before. Administrative and end-user training will be necessary.

204. *Please provide a few examples of the automations mentioned in the RFP.*
     a. See Attachment D (page 17) of the RFP for a listing of goals. We would expect Goal 3 to have the most automation, but will rely on our implementation partner to assist in business process mapping to determine the best approach for automation.

205. Please provide a few examples of the required reporting/dashboards.
     a. This is difficult to provide details around because we do not currently use Salesforce. We don't anticipate a significant number of custom reports or dashboards.

206. *Where is the current data stored?*
    a. Contact data is stored on multiple spreadsheets, Constant Contact, and our loan servicing system (can be exported to Excel). Loan pipeline data is stored in Excel.