



**Answers to Inquiries**  
**RFP #2025-01 | CRM Platform Services**

<b>Inquiries</b>	
<b>Question</b>	Can you please share the expected budget range for this initiative?
<b>Response</b>	<b>The budget range is \$95,000-\$100,000.</b>
<b>Question</b>	Can you provide details on what CRM platform you are currently utilizing and the primary reasons you are looking to transition?
<b>Response</b>	<b>The Coalition is currently using Salesforce. DEL procurement guidelines require a periodic RFP.</b>
<b>Question</b>	Do you have any existing process flow diagrams for the functionality workstreams mentioned, for example, "Purchasing and Travel Requests"
<b>Response</b>	<b>There are no existing flow diagrams.</b>
<b>Question</b>	Are any integrations with existing systems required as part of this initiative? "Ability to share and receive data and tools from other COALITION systems using a network of APIs". Do we just need to state whether the solution has the capability or are there specific systems that will need to be integrated in the scope?
<b>Response</b>	<b>Integration with Tableau is required as part of this initiative. Additional capability mentioned in this question references the ideally modular nature of a CRM to import, in whole or in part, data, applications, and tables from other COALITION systems.</b>
<b>Question</b>	Is multi language required?
<b>Response</b>	<b>Multi-language is not required.</b>
<b>Question</b>	Is there an architecture diagram of the current environment that can be provided?
<b>Response</b>	<b>There is no diagram that can be provided.</b>
<b>Question</b>	What is the desired timeline for implementation and to be live in production in the new system?
<b>Response</b>	<b>The desired timeline for implementation is one year after purchase.</b>
<b>Question</b>	Regarding the requirement "Data Migration support if applicable". Will there be a need to import data from the existing CRM environment? If so, can you give examples of types and volumes of records?
<b>Response</b>	<b>There will be a need to import data from the existing CRM. Data types are primarily text and some other file types (PDF, email, etc.). The volume is estimated to be in the tens of thousands of rows.</b>
<b>Question</b>	What roles and capacity of internal resources from The Coalition have been allocated to this initiative?
<b>Response</b>	<b>We will use input and resources from all departments for this initiative.</b>



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<b>Question</b>	What organization-wide initiatives does this RFP relate to, if any?
<b>Response</b>	<b>The initiative to collaborate with other coalitions in a more effective and relevant way.</b>
<b>Question</b>	What is the biggest pain points you are looking to solve with this RFP?
<b>Response</b>	<b>The ability to collaborate with other coalitions.</b>
<b>Question</b>	What are the systems/platforms currently used by the Coalition?
<b>Response</b>	<b>Coalition currently uses Tableau, Salesforce, MS Office, Adobe Acrobat, QPS, Brookes, Renaissance, Paycor, and Abila for business functionality.</b>
<b>Question</b>	Is data migration support from vendors required? If so, what kind of data needs to be migrated and in what volumes? What format will the data be provided in?
<b>Response</b>	<b>Data migration support is required. Data is primarily text, secondary filing documents (PDF, email, etc.). Data will be provided in CSV format, and any other file types required that are supported by the existing CRM.</b>
<b>Question</b>	What is the ideal timeline for go-live of the new platform?
<b>Response</b>	<b>The ideal timeline is full data and functionality transfer/implementation one year after purchase.</b>
<b>Question</b>	Page 7 (Item F.1): We noted that the Coalition is requesting submission both via email and via mail on a USB. Will the Coalition accept submissions via email only? In our email, we can include a PDF version of our response for your records as well.
<b>Response</b>	<b>Email PDF to <a href="mailto:arichter@elcoc.org">arichter@elcoc.org</a> and mail USB to 7700 Southland Blvd., STE 100 Orlando, FL 32809.</b>
<b>Question</b>	Page 7 (Item G.1): Is the Vendor Registration required prior to submission of the proposal, or will this be completed by the awarded vendor? If required ahead of the proposal deadline, can the Coalition please clarify which registration forms are necessary at this time? Our understanding is that some of the forms in the RFP, such as Attachment D, already address certain items in the vendor registration and others, such as the Direct Deposit form, are only applicable to the awarded vendor.
<b>Response</b>	<b>The Vendor Registration Form <a href="https://elcoforangecounty.org/wp-content/uploads/2025/01/Vendor-Registration-Form.pdf">https://elcoforangecounty.org/wp-content/uploads/2025/01/Vendor-Registration-Form.pdf</a> . The other forms will be required for the contracted vendor.</b>
<b>Question</b>	What challenges are you experiencing with Salesforce that prompted this RFP?
<b>Response</b>	<b>The opportunity cost of Salesforce when compared to other options in terms of application development and deployment is high.</b>
<b>Question</b>	Can you confirm all of your forms that are integrated with Salesforce are using 123 Form Builder?



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<b>Response</b>	<b>All forms integrated with Salesforce are using 123FormBuilder.</b>
<b>Question</b>	What issues or limitations are you facing with 123 Form Builder?
<b>Response</b>	<b>There are limitations with regards to Salesforce integration, specifically the ability to create multiple rows from a single entry with some data entry options (i.e. short response, select multiple, etc.).</b>
<b>Question</b>	What other third-party applications are currently integrated with Salesforce? Are there any issues or limitations with these integrations?
<b>Response</b>	<b>Third-party applications that are currently integrated with Salesforce is Tableau, Adobe Sign, 123 FormBuilder, and Dialpad.</b>
<b>Question</b>	Are there any specific organizational processes that need improvements within Salesforce?
<b>Response</b>	<b>The ability to collaborate with other Coalitions with data and module development is hindered by Salesforce’s proprietary structure and languages.</b>
<b>Question</b>	Can you confirm if you are using Salesforce Nonprofit Success Pack?
<b>Response</b>	<b>We cannot confirm that we are using Salesforce Nonprofit Success Pack.</b>
<b>Question</b>	Are there any custom objects that need to be modified, retired, or transitioned to standard Salesforce objects?
<b>Response</b>	<b>There may be custom objects that may be retired or modified.</b>
<b>Question</b>	Are there any pain points or limitations with any existing Flow-based automations?
<b>Response</b>	<b>Flow-based automation does not allow reference to other objects’ fields for the purpose of non-relational row creation.</b>
<b>Question</b>	Does your organization have Apex Triggers, Classes, or Batch Jobs running to support organizational processes?
<b>Response</b>	<b>There are instances of Apex Triggers and Classes that support organizational processes.</b>
<b>Question</b>	What data bottlenecks are you experiencing that need to be addressed?
<b>Response</b>	<b>Transitioning data from government resources (accessed via Tableau) into the existing CRM is an issue.</b>
<b>Question</b>	Are you using Dynamic Forms for page layouts?
<b>Response</b>	<b>No Dynamic Forms are being used for page layouts.</b>
<b>Question</b>	Are there any specific compliance requirements that need to be met (GDPR, HIPAA, FERPA, etc.)?
<b>Response</b>	<b>HIPAA compliance must be met.</b>



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<b>Question</b>	Do you have key reports or dashboards that are built outside of Salesforce?
<b>Response</b>	<b>There are many key reports built outside of Salesforce in platforms including: EFSM, Brookes, QPS, and Tableau.</b>
<b>Question</b>	Do you require any new functionality not currently available in your Salesforce org?
<b>Response</b>	<b>The functionality to share and receive modules from other Coalitions is desired.</b>
<b>Question</b>	Which systems currently integrate with Salesforce? (Accounting, HR, marketing, etc.)
<b>Response</b>	<b>Family Services and Provider Services currently integrate with Salesforce.</b>
<b>Question</b>	Are there existing data issues (duplicates, outdated records) that must be addressed?
<b>Response</b>	<b>There are no existing data issues that must be addressed.</b>
<b>Question</b>	Are you able to say anything about the scope associated with what data (i.e., # of forms, workflows, processes, etc.) will need to be replicated in a new system (based on what ELC of Orange currently has in their current CRM)?
<b>Response</b>	<b>A new system will need to replicate an estimated fifty forms and one hundred objects along with associated rows and processes that allow the Coalition to serve internal needs, as well as external business and individual client needs.</b>