CLARIFICATION RESPONSE ADDENDUM

Salesforce System Enhancement & Optimization RFP

Issued by: Umoja Community Education Foundation (UCEF)
Response date: August 13, 2026
Proposal deadline: September 2, 2026
Status: PUBLISHED
Applies to: All known prospective vendors

Purpose and use

This addendum consolidates and de-duplicates clarification questions received through the Salesforce System Enhancement & Optimization RFP process. Similar questions have been combined so all prospective vendors receive the same information.

Vendors should incorporate these clarifications into their proposals and identify any remaining assumptions or dependencies. No response in this addendum changes UCEF's right to modify or cancel the RFP, reject proposals, request clarification, or negotiate terms.

Procurement & Eligibility

Q01. May qualified international firms, independent consultants, and small practices submit proposals?

Response: At this time, we can only accept proposals from firms in the United States of America.

Q02. Must one proposer cover every workstream, including Apex-heavy work, or may scope be split across specialists?

Response: The RFP currently contemplates one selected vendor responsible for all four workstreams. A vendor may propose a qualified team or subcontractor structure, but should identify who will perform each workstream and remain accountable for the complete scope. A proposal limited to only part of the scope would be considered only if UCEF elects to phase or re-procure work.

Q03. How may vendors evidence certifications and personnel qualifications when the RFP says not to submit resumes?

Response: Do not submit full resumes. Provide concise team/staffing information within the proposal, including names or roles, relevant certifications, years of experience, and the workstreams each person will perform. Supporting certification evidence may be requested during evaluation.

Q04. Can the required Salesforce Administrator certification be held by a named delivery partner or subcontractor rather than the lead consultant?

Response: The proposed delivery team must include at least one individual who holds the required Salesforce Administrator certification and will perform a material role in the engagement. The proposal should identify that individual and their responsibilities.

Q05. What types of references are acceptable?

Response: Provide at least two client references for comparable Salesforce engagements. Nonprofit, education, or mission-driven experience is preferred but not mandatory; commercial engagements are acceptable when the scope is comparable. Current engagements may be used if the reference can speak to work already performed.

Commercial & Contracting

Q06. Is there an approved budget range or not-to-exceed amount?

Response: Vendors should submit their best detailed cost proposal, itemized by workstream where possible, using fixed fees by deliverable or milestone or an hourly structure with a not-to-exceed cap.

Q07. Is fixed-fee milestone pricing with an hourly rate for change requests acceptable?

Response: Yes. Fixed fee by deliverable or milestone is preferred. An hourly rate may be included for approved out-of-scope work or change requests, provided the proposal clearly states rates, assumptions, approval controls, and any not-to-exceed cap.

Q08. May vendors propose a fixed-fee discovery phase followed by separately priced implementation milestones?

Response: Vendors may propose a logical milestone sequence, including discovery first. However, proposals should still provide enough pricing and assumptions for UCEF to evaluate the anticipated full engagement. Any proposal that makes later implementation pricing contingent on discovery should clearly state the pricing method, decision gate, and maximum exposure.

Q09. What contracting, insurance, indemnification, data-processing, or security terms should vendors anticipate?

Response: The selected vendor will be engaged as an independent contractor and will be responsible for its own taxes, insurance, and expenses. Organizational data and configurations are confidential and remain UCEF property. Any additional MSA, insurance limits, indemnification, data-processing, security review, or background-check requirements will be provided during contracting.

Timeline & Delivery

Q10. Is the engagement remote, hybrid, or onsite, and how is travel handled?

Response: The engagement is expected to be primarily remote via Zoom.

Q11. Is the six-to-eight-month completion estimate fixed, and is full-time delivery expected?

Response: The RFP identifies an estimated completion period of six to eight months and permits vendors to propose a logical milestone structure. Vendors may recommend sequencing and staffing that fit the scope, but should explain any schedule variance, dependencies, and critical path.

Q12. What are the authoritative question, response, and proposal deadlines?

Response: The deadline for vendor questions was August 10, 2026. UCEF will share responses on August 13, 2026. Proposals are due September 2, 2026.

Q13. How much UCEF stakeholder time should vendors assume for discovery, reviews, UAT, and decisions?

Response: Vendors should include reasonable stakeholder participation assumptions for workshops, reviews, UAT, and acceptance in their proposals. UCEF will identify the project owner and participating functional leads before kickoff.

Scope & Governance

Q14. Are all four workstreams required, and may vendors recommend prioritization or phasing?

Response: All four workstreams are included in the requested scope, with Workstream 1 identified as primary. Vendors may recommend a logical sequence or phased milestone plan, but should address the full scope and clearly state dependencies, assumptions, and any proposed options.

Q15. Who will approve deliverables, KPI definitions, dashboard mockups, and contact merge rules?

Response: UCEF will designate an executive sponsor/project owner and appropriate functional leads. Workstream 4 analysis and design items 1-4 require UCEF approval before dashboard construction. The final governance and acceptance structure will be confirmed at kickoff.

Q16. Is there an incumbent Salesforce partner or existing documentation for transition?

Response: There is no incumbent Salesforce partner. Current system documentation is available and will be provided at the beginning of the engagement.

Platform & Environment

Q17. How many Salesforce orgs and what sandbox types are available?

Response: UCEF operates a single Salesforce production org (Unlimited Edition, Hyperforce instance USA384). Sandbox licenses available: 100 Developer (0 in use), 5 Developer Pro (0 in use), 1 Partial Copy (0 in use), and 1 Full sandbox (currently in use; last refreshed 2/27/2026). Additional Developer, Developer Pro, or Partial Copy sandboxes can be provisioned for the engagement.

Q18. What deployment tooling and production-access model are used?

Response: UCEF does not currently use a third-party deployment tool (no Gearset, Copado, or similar packages are installed). Deployments to date have used native Salesforce tooling (change sets/manual configuration). Vendors should propose a controlled build, test, UAT, and deployment approach and identify required access; production changes will be subject to UCEF approval and change controls established during kickoff. Appropriate vendor access, including a System Administrator license where warranted, will be arranged during onboarding.

Q19. What Salesforce products and user license types are active?

Response: The org is Salesforce Unlimited Edition (Sales & Service functionality) on Hyperforce, with Marketing Cloud Growth and Einstein Activity Capture (connected to Microsoft 365 via application-level authentication) in use. User licenses: 20 full Salesforce licenses (20 in use) and 100 Customer Community Plus licenses (61 in use) supporting the partner/customer portal, plus Identity, Integration, and Chatter license pools. Experience Cloud hosts five sites, including the Umoja Campus Programs Portal.

Q20. Is NPSP or Nonprofit Cloud installed or planned?

Response: Neither the Nonprofit Success Pack (NPSP) nor Nonprofit Cloud is installed. The org uses the standard Salesforce data model with custom objects for program operations (e.g., Umoja Students, Campus Partners Records, submissions and course/observation records). No migration to NPSP/Nonprofit Cloud is contemplated within this scope.

Q21. What are the current data volumes, duplicate rate, and API consumption?

Response: Approximate current volumes: 7,569 Contacts; 400 Accounts; negligible Leads; ~7,539 Umoja Student records and related custom program objects; 5,376 Campaign Members; 506 Opportunities; 47,771 Tasks and 35,537 Events; Eventbrite-sourced records (~11,191 Attendees, 18,534 Answers, 4,162 Orders). Storage: 597 MB of 12.5 GB data storage (5%) and 815 MB of 52 GB file storage (2%) used. API consumption is minimal: roughly 1,400 requests in the last 24 hours against a 220,000/day limit. A verified duplicate rate is not available and should be quantified during discovery.

Automation

Q22. How many active Flows, Process Builders, Workflow Rules, approvals, Apex triggers/classes, and managed-package automations exist?

Response: Automation inventory: 75 active Flows in total, of which approximately 20 are UCEF-built (a mix of record-triggered, scheduled, and Marketing Cloud Growth segment-triggered flows) and the remainder ship with managed packages. There are no Process Builder processes, no active Workflow Rules (two inactive package rules only), and no classic approval processes. Custom Apex is negligible (0.15% of the Apex character limit; all 26 Apex triggers belong to managed packages - Adobe Sign, Eventbrite, Formstack). The audit workstream should therefore focus on Flow rationalization and managed-package automation behavior rather than legacy tooling migration.

Q23. Are routing, notification, reminder, approval, and assignment rules already documented?

Response: Vendors should include discovery with operational stakeholders to confirm business processes, decision logic, ownership, and exceptions before building. Documentation for the current state exists, including data structures and rules. Vendors should recommend adjustments and additional standardizations during discovery.

Q24. Are program, region, role, and other routing attributes already standardized in Salesforce?

Response: Vendors should include discovery with operational stakeholders to confirm business processes, decision logic, ownership, and exceptions before building. Current attributes are standardized, and vendors may propose adjustments and shifts post-discovery.

Department Applications

Q25. Which and how many departments are in scope for department-specific applications?

Response: Programs, Development, Communications, and Administration are the current departments in scope for this RFP. Vendors may recommend additional departmental inclusions during discovery.

Q26. Does each department need a net-new app or mainly tailored views, layouts, permissions, and reports?

Response: Workstream 2 may include Lightning apps, objects, record types, page layouts, tabs, permissions, and department-specific reports/dashboards. The exact mix will be determined through requirements discovery. Vendors should explain their sizing assumptions and distinguish configuration-only work from net-new data-model or process builds.

Q27. Do departments require true data isolation or tailored UI over shared data?

Response: Current organization-wide defaults are broadly open for internal users (Contact, Account, and Opportunity are Public Read/Write; Case and Lead are Public Read/Write/Transfer; Campaign is Public Full Access), while the external sharing model is enabled and external defaults are Private. Department experiences today would therefore be delivered through a tailored UI over shared data; vendors should assess confidentiality needs (e.g., HR or student information) and recommend the least-complex secure model, identifying any OWD tightening and its impact on sharing and recalculation.

Q28. Will partner/community users use new intake processes or department applications?

Response: External users access the org through Experience Cloud: five sites are live, including the Umoja Campus Programs Portal (Aura), a Marketing Landing Pages site (LWR), Newsletter Archive, Umoja Knowledge, and Umoja Newsletters. Partner/customer users hold Customer Community Plus licenses (61 of 100 in use). Vendors should state assumptions about internal versus external users; Workstream 2 department applications are expected to be internal-facing unless portal changes are separately identified.

Contact Data

Q29. Should contact cleanup be staged and validated outside production?

Response: Yes. Vendors should propose a controlled, reversible cleanup approach that includes profiling, matching/survivorship rules, stakeholder validation, testing in an appropriate non-production environment where feasible, backups, approval, and monitored production execution. Direct unvalidated bulk remediation in production should not be assumed.

Q30. Which records are included in cleanup beyond Contacts?

Response: Workstream 3 explicitly covers contact records and contact-related automation. Related Accounts, partner records, program-reporting records, Campaign Members, Leads, or portal users should be included only where necessary to preserve referential integrity, prevent recurrence, or implement approved matching/survivorship rules; vendors should identify any such dependencies and price material expansion separately.

Q31. What creates duplicate contacts, and are EAC or integrations contributing?

Response: Confirmed contact-creation/update paths include the Umoja Campus Programs Portal (Experience Cloud), the Eventbrite managed package (Events Made Easy), Adobe Acrobat Sign, Formstack form submissions, Marketing Cloud Growth, Einstein Activity Capture (connected to Microsoft 365 with application-level authentication), plus imports and staff entry. The selected vendor should trace each path and address upstream causes as part of the remediation design; the confirmed root cause of duplicates has not been established.

Q32. Are duplicate/matching tools or rules already in use, and who owns post-project governance?

Response: Native Salesforce duplicate management is in place: the three standard duplicate rules (Account, Contact, Lead) are active with standard matching rules, and one custom Eventbrite contact matching/duplicate rule exists but is currently inactive. No third-party deduplication tools are installed. The engagement should audit and repair these rules and recommend a maintainable governance model; UCEF will name the post-project data steward before kickoff.

Integrations

Q33. Are existing integrations dependencies only, or may they be modified or rebuilt?

Response: Campus Partner Portal, MightyCause, Eventbrite, and Adobe Sign are existing integrations. Vendors should treat them as dependencies unless changes are necessary to deliver an RFP workstream, prevent recurring data-quality issues, or implement an approved dashboard source strategy. Any material modification, rebuild, new subscription, or middleware requirement should be separately identified with cost and maintenance implications.

Q34. Are the listed integrations managed packages, custom integrations, middleware, or manual imports?

Response: Eventbrite (Events Made Easy managed package), Adobe Acrobat Sign (managed package plus Document Builder), and Formstack (managed package) are installed managed-package integrations, and the Campus Partner Portal is a native Experience Cloud site. Marketing Cloud Growth and Einstein Activity Capture are Salesforce-native connections. MightyCause is not an installed package and operates outside the org with a MightyCause native connection. No middleware platform is in use. Vendors should treat these as dependencies per Q33.

Dashboards

Q35. What are the eight required dashboards?

Response: The eight required dashboard domains are: Human Resources; Information Technology; Performance Management; Communications; Facilities; Compliance; Contracts; and Agency-Wide Initiatives. The revised RFP also lists required metric areas for each domain.

Q36. Are KPI definitions final, or should discovery include KPI definition and mockups?

Response: The dashboard domains and required metric areas are defined, but the selected vendor must recommend final KPIs, definitions, calculations, units, reporting frequency, targets/thresholds where applicable, ownership, data sources, and mockups. These analysis and design items require UCEF approval before dashboard construction begins.

Q37. Where does dashboard data currently reside, and how much is outside Salesforce?

Response: Outside of program data, the majority of UCEF data currently resides outside Salesforce. Vendors should include source identification and data strategy in the discovery process.

Q38. Is historical loading and trend reporting required where no current system of record exists?

Response: No. Historical loading and trend reporting are not required where no current system of record exists.

Q39. Should dashboards be built in native Salesforce, Tableau, or CRM Analytics?

Response: Native Salesforce reports and dashboards are expected where practical. Vendors may recommend dashboards in other available tools. Any CRM Analytics or other new licensing should be presented as an optional recommendation with cost and maintenance implications and should not be assumed in the base price.

Q40. What dashboard refresh cadence, audience views, subscriptions, and external distribution are required?

Response: The selected vendor must recommend a refresh/update cadence for each KPI, configure role-based views, filters, drill-downs, refresh schedules, subscriptions, and automated distribution to defined audiences, and document refresh logic. Exact audience counts and external-recipient needs will be confirmed during design.

UAT, Training & Support

Q41. Who provides UAT participants and who facilitates UAT?

Response: UCEF will provide appropriate business users and acceptance decision-makers. The selected vendor should prepare test scenarios, support test data and execution, track defects, facilitate resolution, and document acceptance.

Q42. What documentation and knowledge transfer are required?

Response: At minimum, deliver a discovery summary, data dictionary, automation inventory, configuration notes, dashboard documentation and refresh logic, contact data standards, maintenance recommendations, and knowledge-transfer session(s) for internal staff/admin. Vendors may recommend additional user guides or audience-specific training.

Q43. Is post-implementation support expected?

Response: The required scope includes documentation, knowledge transfer, and maintenance recommendations. Vendors may separately price an optional post-implementation stabilization or support period, stating duration, coverage, service levels, and rates.

Procurement Process

Q44. How many vendors received the RFP, and will interviews be virtual or onsite?

Response: The RFP was shared publicly; UCEF did not directly solicit individual vendors. Any vendor interviews will be conducted virtually.