

Request for Proposal (RFP): Discovery for Salesforce Development Services

Date Issued: November 25, 2024

Proposal Due Date: December 16, 2024 at 3:00pm EST

Contact Information:

- Name: Ashley Marshall
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- Phone: 937-602-5931

1. Proposal Content Requirements

A completed proposal must be submitted electronically to Ashley Marshall at ashley.marshall@preschoolpromise.org by January 13, 2025 at 3:00pm EST and must include the following:

- a. A business proposal with the information described in Section 4
- b. A fee proposal with the information described in Section 4
 - i. Vendors are expected to provide a transparent and detailed breakdown of all costs associated with the work and ongoing maintenance and support. Preschool Promise, Inc. requests that pricing structures be clearly laid out to minimize any unforeseen circumstances. Please provide details on any additional fees that may be incurred for services beyond the scope initially agreed upon.

2. Preschool Promise Background

Preschool Promise, Inc. is a nonprofit located in Montgomery County, Ohio focusing on kindergarten readiness in our local community. Preschool Promise works with over 120 local child care and preschool providers in Montgomery County, Ohio. We service over 2500 children/families and over 600 teachers.

Over the past year we have transitioned from Sugar to Salesforce and are seeking proposals from qualified Salesforce developers to assess the status of the build and implementation of our current Salesforce system and identify recommendations to help us achieve our original goals with the database.

We invite vendors with layers of technical expertise in developing and refining Salesforce in multifaceted organizational settings, especially those in nonprofit settings, to submit a response to the RFP. Vendors should excel in actively listening to the client, assessing current needs, refining and developing solutions.

We hope to engage a vendor early in 2025.

Purpose:

The purpose of this RFP is to find a vendor who can assist us in the assessment and refinement of our Salesforce instance to improve efficiency. Ideally, the proposed solutions will be agile enough to adapt to future organizational needs.

Currently, the business processes involve operating with more than desired manual effort. The system has been developed but is not as efficient, or streamlined as originally desired.

The greatest areas of opportunity for Preschool Promise fall in the Customer Interaction area with recommended improvements focused on eliminating manual workarounds, data accuracy and deduplication, and targeted insight into member data and process orchestration to relieve internal staff processing and provide better customer service and transparency.

First, we aim to improve efficiency and automation of case management functions across the organization. Second, it is a primary objective to achieve full integration across as many business processes as possible.

Preschool Promise seeks an organization with the ability to analyze and make recommendations including, but not limited to, increasing automation, efficiency, cross departmental collaboration, and better use of data to provide a quality customer and employee experience.

As well as above, we are looking for recommendations on how best to use our current and possible new software integrations, to help streamline our various systems including telephone, SMS messaging, and other organizations.

Integrations that are currently or soon to be deployed include: Formstack, SMS Magic, Vonage, and Classy.

Overview of System:

Children/Families

The system utilizes Formstack to gather application data for children/families enrollment into Preschool Promise. Salesforce calculates tuition assistance, tracks attendance for children, allows us to assign children into classrooms at our partner sites, and assists in budget forecasting for tuition assistance. Families portals have been developed in the Experience Cloud for families to access their application and enrollment information, as well as upload any necessary documentation.

Teachers

The system utilizes Formstack to gather professional development applications, and questionnaires from teachers. The system should be able to track teachers and their workplace assignments, assign teachers into professional development, track attendance at professional development, and track any stipend/payment information given to teachers by Preschool Promise. Teacher portals have been developed in the Experience Cloud for teachers to access their professional development applications, update employment records, update contact information, and see any important information and updates.

Programs

The system is being built so our providers are able to log into a “Provider Portal” and view their classrooms and teachers assigned, children enrolled and their application status, as well as enter attendance for children currently enrolled.

3. Project Scope/Deliverables

The objective of this RFP is to identify those respondents with the expertise, track record and resources that can assist us in understanding our needs and analyzing our current system to make specific recommendations on how to best meet the goals of Preschool Promise, with estimated costs for implementing those recommendations. We are looking for a vendor to complete the following deliverables:

- A. Analysis and Planning
 - a. Understand the needs of our program

- b. Review current system set-up
 - c. Review future Salesforce needs of Preschool Promise
- B. Capability Mapping and Process Flows
 - a. Review processes and process automations
 - b. Identify any additional pain points to be solved
 - c. Review current integrations
- C. Written Report - Technical Assessment
 - a. Provide written recommended adjustments or changes to current system
 - b. Clearly define the opportunities for improvement and/or additional functionality
 - c. Prioritize recommendations based on need, value, and level of effort
 - d. Create a data-flow diagram of current and future state architecture
 - e. Submit a detailed project plan including:
 - i. Itemized cost estimates to implement each phase/project
 - ii. Timeline for implementing each phase/project
 - iii. Clarification on what will be needed from Preschool Promise to complete each phase
- D. Project Management
 - a. Facilitate weekly status calls with Preschool Promise team
 - b. Provide written weekly updates on progress
 - c. Manage the budget, scope, and task-level tracking and reporting to ensure the project stays on schedule and on budget

4. Business Proposal Requirements

- A. Identification of Respondent
 - a. Respondent name
 - b. Street address
 - c. City
 - d. State
 - e. Zip
 - f. Contact Name
 - g. Phone
 - h. Email
- B. Executive Summary
 - a. Provide a high-level description of the proposed scope of services.
- C. Relevant Experience

- a. How many years has the company been engaged in developing Salesforce in public environments?
 - b. Please provide a brief company history and overview.
- D. Personnel
- a. Describe the team structure that will work on this project.
 - b. Describe the project role and responsibilities for each key staff member and sub-contractor that would be working on this project.
 - c. Please describe the cost breakdown for each type of staff member that will be engaged in the project.
 - d. Will you use subcontractors? If yes, please describe how you as the prime contractor will direct the work of all subcontractors to ensure the quality and timeliness of work.
- E. Approach
- a. Explain your approach and methods for quality management to complete the deliverables detailed above.
 - b. Describe your proposed project approach, including a project plan. This project plan should include tasks, deliverables, resources and timelines. Identify what tasks the vendor is responsible for and what tasks Preschool Promise, Inc. will be responsible.
 - c. Describe your transition plan from our current vendor to you.
- F. Technical Response
- a. How many Salesforce implementations have you completed in the past 3 years?
 - b. How many Salesforce refinements and extensions have you completed in the past 3 years?
 - c. Describe your approach to assessing and elaborating current workflows and system requirements.
 - d. Describe how you will get to know our system and how it is currently configured.
 - e. How do you handle change requests?
 - f. Are you experienced in customizing Salesforce using both declarative and programmatic approaches? Please give an example.
 - g. Describe your training approach for end-users, managers and administrators.
 - h. Will there be a repository for training materials accessible by users?
 - i. Describe the technical training that will be provided for team members that might ultimately support and maintain the application and/or the infrastructure.
 - j. Describe how you successfully work with clients who do not have dedicated IT or Salesforce professionals on staff.

G. Project Management

- a. What tools will be used for project management and communication?
- b. How frequently will status updates and meetings occur?

H. Costs

- a. Provide a detailed breakdown for the project in phase and task-level detail.
- b. Is ongoing maintenance included in the proposal or is it charged separately?

I. Future Enhancements and Upgrades

- a. How do you ensure the solution is scalable for future growth?
- b. How do you handle Salesforce upgrades to ensure continuity of custom features?

J. Provide three references with business name, contact information and a short summary of work completed.