

Amendment #2 – Questions & Answers

Question 1

EMHware Integration - The RFP identifies EMHware as a core system for Client Management and Session Management. Does Kerry's Place have documentation for EMHware's API or integration capabilities? Will the EMHware vendor be available to participate in integration planning and development, or is the selected Salesforce implementation partner expected to manage the EMHware integration independently?

Answer 1

EMHware will not be replaced by Salesforce as the client record however there may be minor data migration needed for current clients.

EMHware has some API capabilities and are willing to work with third parties.

Question 2

MyCommunityHub - The RFP notes that Kerry's Place "would like to have" MyCommunityHub as part of the integration. Is MyCommunityHub integration a requirement for the initial implementation (Phases 3-4), or can it be addressed as part of Phase 5 post-implementation enhancements? Additionally, does Kerry's Place intend to continue using MyCommunityHub long-term alongside Salesforce, or is the goal to eventually migrate its functionality into Salesforce?

Answer 2

Kerry's Place does not intend to continue using MCH for Salesforce based programs (Clinical and L&D) therefore no integration or migration with MCH is required.

Question 3

Data Migration - Could you provide additional detail on the data migration scope?

- Approximately how many client/contact records are expected to be migrated?
- Which systems are the primary sources for migration (e.g., EMHware, MyCommunityHub, spreadsheets, other)?
- Are there specific data quality concerns or known gaps in the existing data?

Answer 3

Kerry's Place does not intend to continue using MCH for Salesforce based programs (Clinical and L&D) therefore no integration or migration with MCH is required.

Question 4

User Counts - To support accurate licensing guidance and portal configuration:

- Approximately how many internal staff users will require Salesforce access?

- Approximately how many external users (clients, families, caregivers) are anticipated for the Community portal?

Answer 4

Approximately 45 staff users

Approximately 700 authenticated external users annually

Approximately 600,000 views, 200,000 users (Clinical = ~47,000 views and ~37,800 users) unauthenticated users annually

Question 5

Deloitte Phase 1-2 Deliverables - The RFP references work completed by Deloitte (Nov. 2025 - Jan. 2026), including a needs assessment and system evaluation. Will the detailed deliverables from Phases 1 and 2 (e.g., workshop notes, process documentation, the finalized SOW referenced in Schedule G) be shared with the selected implementation partner? Are these materials available to proponents during the RFP process to support proposal development?

Answer 5

Additional information can be shared to the successful proponent.

Question 6

Constant Contact - Kerry's Place currently uses Constant Contact for email marketing. With Marketing Cloud Advanced included in the Salesforce implementation, does Kerry's Place intend to retire Constant Contact and fully transition email marketing to Salesforce Marketing Cloud? Or should the implementation plan include ongoing integration between the two systems?

Answer 6

Kerry's Place intends to fully transition email marketing to Salesforce.

Question 7

Insurance Coverage - The RFP states an insurance requirement of "2-5 million" in one section and "\$5,000,000" in another. Could you confirm the minimum required coverage amount for commercial general liability insurance?

Answer 7

Kerry's Place requires \$5,000,000 (5 million) in commercial general liability coverage.

Question 8

I noticed the RFP requires the partner to be a Canadian company or have 90% of staff located in Canada. Could you please clarify:

1. Is this requirement strictly mandatory with no exceptions?
2. Would a company with proven international non-profit Salesforce experience (US/UK) but based outside Canada be considered?

Answer 8

There is currently a restriction on U.S. companies, the mandatory criteria is that your company can't be from the U.S.. The company doesn't have to be from Ontario and/or Canada but we will require the option of in-person meetings.

Additionally, there is a portion of the score used to give preference to Ontario & Canada based companies.

Question 9

For each migration source system (EMHware, FreshBooks, MyCommunityHub, and any spreadsheets), approximately how many records exist, and how many years of historical data must be migrated?

Answer 9

Kerry's Place does not intend to continue using MCH for Salesforce based programs (Clinical and L&D) therefore no integration or migration with MCH is required. There may be minor data migration required with EMHware for current clients.

Question 10

Which system is the current system of record for client/contact data, and what is the current state of data quality (e.g., known duplicates, completeness gaps)?

Answer 10

EMHware is the current client record system. There are no concerns for data quality.

Question 11

Will Kerry's Place provide clean data extracts in an agreed format, or is extraction from source systems part of the vendor's scope?

Answer 11

Kerry's Place would be responsible for providing any data that is needed in a standard format that is useable.

Question 12

How many total Salesforce users are anticipated, broken down by role (e.g., clinical, intake/admin, finance, marketing, leadership)?

Answer 12

Approximately 45 staff users

- Intake/admin staff – 17
- Managers – 7
- Marketing team – 3
- Finance team – 4
- Clinical team – 13
- L&D team - 3

Question 13

What is the expected volume of external/community portal users for Customer Community Plus?

Answer 13

Approximately 700 authenticated external users annually

Approximately 600,000 views, 200,000 users (Clinical = ~47,000 views and ~37,800 users) unauthenticated users annually

Question 14

Approximately how many staff require training, across how many locations, and is training expected in person, virtual, or both?

Answer 14

Approximately 45 staff would require training. Training would be delivered virtually as many staff are located across multiple regions.

Question 15

For the listed systems (Website, MyCommunityHub, EMHware, M365, FreshBooks/Stripe, Constant Contact, Teams/Zoom, Google Analytics, Tableau, social platforms), which require real-time/bi-directional integration versus one-way or batch? Any more information around integrations will be helpful?

Answer 15

Please refer to functional requirements attachment provided.

Some systems would require one-way and others may require bi-directional communication.

Kerry's Place and vendor will work together to evaluate any additional effort required.

Question 16

Do these systems expose supported APIs, and is there existing integration middleware in the environment (e.g., MuleSoft, Zapier) that should be used?

Answer 16

Some systems have API abilities; others require data extraction. Kerry's Place does not currently utilize middleware. Please provide estimates if middleware is required based on functional requirements provided.

Question 17

EMHware appears both as an integration target and as out-of-scope for replacement — can you confirm the expected integration depth (read-only sync, bi-directional, or reference only)?

Answer 17

Kerry's Place does not intend to replace EMHware with Salesforce at this time. There may be minor data migration required with EMHware for current clients.

Question 18

MyCommunityHub is noted as "would like to have part of integration" — is this in-scope for the initial implementation, or a future-phase item?

Answer 18

Kerry's Place does not intend to continue using MCH for Salesforce based programs (Clinical and L&D) therefore no integration or migration with MCH is required. There may be minor data migration required with EMHWare for current clients.

Question 19

Are all "Nice to Have" functional requirements expected to be deployed within the project scope or just a subset, please clarify?

Answer 19

"Nice to have" items from the functional requirements are a subset or future integration objectives. They should not be included in quotes for implementation at this time.

Question 20

Schedule G references the current-state assessment and system evaluation. Can the relevant current-state process documentation and any existing process maps be shared with responding vendors?

Answer 20

Additional information can be shared to the successful proponent.

Question 21

Could you please confirm which Salesforce products and licenses have been purchased, including Nonprofit Cloud, Service Cloud, Experience Cloud, Marketing Cloud, Data Cloud, or other Salesforce solutions?

Answer 21

This is listed in the RFP on pg. 2 #2

- Nonprofit Cloud – Enterprise Edition
- Salesforce Scheduler - Enterprise Edition
- Customer Community Plus for Nonprofits
- Premier Success Plan – Salesforce Platform
- Marketing Cloud – Advanced – Enterprise Edition
- Customer Data Cloud for Marketing

Question 22

What are the primary business objectives and operational processes that the Salesforce implementation is expected to support?

Answer 22

This is listed on pg. 1-3 of the RFP

Additional points:

- Replacement of MCH for applicable programs (Clinical and L&D)
- Integration with current KPAS website
- Integration or replacement of Freshbooks to enable invoicing and registration through website/portal
- Replacement of marketing email system (constant contact)
- Replacement of manual processes such as registration emails, calls, payment, scheduling

Question 23

Are there any existing systems from which data will need to be migrated into Salesforce?

Answer 23

Kerry's Place intends to replace the use of Constant Contact for marketing emails therefore data migration would be required. There may be minor data migration required with EMHware for current clients.

Question 24

What third-party applications, finance systems, HR platforms, case management systems, or communication tools are expected to be integrated with Salesforce?

Answer 24

This is listed in the RFP in Appendix A – Current State System Architecture

Integration is expected with Social media, meta business, google analytics, constant contact WordPress. No integration is required with MCH (Paysafe) or Freshbooks (Stripe). Some minor data migration may be required with EMHware. Systems that are out of Scope include ADP and Sage.

Question 25

Does the project include implementation of client management, service delivery tracking, fundraising, volunteer management, donor management, or community engagement capabilities?

Answer 25

This project includes implementation of client management, service delivery tracking and community engagement. This project does not include implementation of fundraising, volunteer management and donor management.

Question 26

What are the anticipated user volumes, business units, and stakeholder groups that will utilize the platform?

Answer 26

Approximately 45 staff users will access the platform across operational, finance, marketing, and administrative teams.

Approximately 700 authenticated external users

Approximately 600,000 views and 200,000 users (Clinical = ~47,000 views and ~37,800 users) unauthenticated users

Question 27

Is end-user training, change management, and post-go-live support included within the expected scope of work?

Answer 27

This is listed on the RFP pg. 2 #3 Scope of Work – Implementation Support

Question 28

Are there any specific compliance, privacy, security, or data residency requirements that bidders should consider?

Answer 28

This is listed on the RFP in Appendix C

Question 29

Would Kerry's Place be open to implementation support delivered through a combination of local and offshore Salesforce resources?

Answer 29

Yes, but the primary implementation lead, project manager should be in Ontario/Canada and able to come onsite.

Question 30

Could you please share the detailed evaluation criteria, project timelines, and implementation expectations included within the full RFP package?

Answer 30

All information that is needed is provided in the existing RFP, questions received by the deadline will be answered via Amendment.