Amendment #3 - Questions & Answers – Part 2

Question 1
How many source systems for data migration?
Answer 1
This can be a new net setup or some data can be migrated from EMHware and Freshbooks for current clients.

Question 2
Which Salesforce products or clouds have been purchased?
Answer 2
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 3
Is there an incumbent Salesforce partner currently supporting the organization?
Answer 3
No

Question 4
Is Kerry's Place open to proposals from individual consultants, or only established consulting firms?
Answer 4
Open to anyone who meets the requirements of the RFP.

Question 5
Is there an estimated budget range for the implementation?
Answer 5
Yes, this is listed on the RFP on pg. 3.

Question 6
Could you please walk us through the complete client journey — from the first point of contact with Kerry's Place, through inquiry and assessment, to the point where the individual becomes an active service recipient?
Answer 6
This is indicated in Schedule G of the RFP in the "Current State FFS Journey".

Question 7
Within the current client engagement process, which activities are handled manually today, and which of those would you prioritize for automation within Salesforce?
Answer 7
This is indicated in Schedule G of the RFP in the “Current State FFS Journey”.

Question 8
What specific reports, dashboards, or KPIs does your team rely on to track client engagement levels and measure how effectively inquiries convert into active service relationships?
Answer 8
KPIs primarily include page views for specific products, and clicks to MCH, in the absence of conversion data. Currently, we rely on several types of reports:

- Google Analytics reports for website, campaign and program-specific metrics – i.e.. traffic, users, sessions, page views
- Constant Contact to track email opens, sends, delivers, clicks, bounces
- Campaign dashboards developed by marketing agency to track leads and awareness – i.e.. impressions, click through rate, cost per click, cost per acquisition, conversions (currently clicks to MCH)
- ‘How Did You Hear About Us’ data via MyCommunity Hub registrations and Intake submissions via the website
- Client data in EMHware for new and returning clients/families at Intake
- LinkedIn ads dashboard – impressions, views, CPC, clicks, applicant conversions
- Resource Portal reporting – quarterly download summary of specific resources funded by the Ministry. This is done manually
- Research survey reports – for internal and external surveys

Question 9
Could you please describe the end-to-end onboarding journey — starting from inquiry receipt, through eligibility assessment, and up to the point a client is formally enrolled in a service?
Answer 9
This is indicated in Schedule G of the RFP in the “Current State FFS Journey”.

Question 10
What are the biggest challenges or bottlenecks your team faces in the current onboarding process, particularly around tasks that are repetitive, manual, or prone to error?
Answer 10

Any tasks using manual processes to complete which are identified in Schedule G of the RFP "Current State FFS Journey" referencing the technology systems legend at the bottom to indicate which systems are automated and which are manual (excel, word, outlook are all manual processes).

Question 11
Of the steps involved in onboarding and eligibility determination, which should be fully or partially automated within Salesforce, and are there any steps that must remain manual due to regulatory, clinical, or operational reasons?
Answer 11
This is identified in the RFP in Schedule G. Please reference both the "Current State FFS Journey" and the "Minimal Viable Product (MVP)" document in Appendix B. Please refer to the legend to understand new or existing capabilities. Please also refer to the "Functional Requirements" document to understand automated capabilities required.

Question 12
Are there any reporting, audit trail, documentation, or approval requirements tied to onboarding decisions and eligibility determinations, such as compliance, funder reporting, or internal accountability requirements?
Answer 12
Initial priority programs are not funded by MCCSS (no Compliance requirements); standard financial auditing requirements; require an ASD diagnosis to access all services along with initial consent signed with reference to specific policies/terms & conditions as part of onboarding – see website here.
Other compliance considerations:

- PHIPA
- PIPEDA
- College of Psychologists and Behaviour Analysts/Standards of Professional Conduct (CPBAO)
- Payment Card Infrastructure (PCI)
- Multi-Factor Authentication (MFA)
- General Data Protection Regulation (GDPR) (EU-Specific)
- Geolocation (consideration)
- Accessibility for Ontarians with Disabilities Act (AODA), 2005

Question 13

What does the client registration process look like today prior to service delivery commencing — what information is collected, by whom, through which channels, and in which systems is it recorded?

Answer 13

This is indicated in Schedule G of the RFP in the "Current State FFS Journey" and the "Minimal Viable Product (MVP) in Appendix B. Please reference the legends to understand new and existing capabilities.

Question 14

Could you provide a high-level overview of your core business operations — specifically how programs and services are structured, how clients move through the service lifecycle, and how intake, clinical, administrative, and finance teams interact throughout that journey?

Answer 14

This is indicated in Schedule G of the RFP in the "Current State FFS Journey" and the "Minimal Viable Product (MVP) in Appendix B. Please reference the legends to understand new and existing capabilities.

Question 15

Please provide approximate annual volumes for inquiries, assessments, registrations, active clients/service recipients, service enrollments, and key transactions expected to be handled through Salesforce.

Answer 15

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 16

Which systems will remain systems of record after Salesforce implementation, and what data must be integrated or synchronized between Salesforce and systems such as EMHware, MyCommunityHub, FreshBooks, Stripe, or any other applications?

Answer 16

EMHware will remain as the client record. There may be minor data migration needed for current clients from EMHware. All other systems can be set up as net new.

Question 17

What historical data is expected to be migrated into Salesforce, including client records, inquiries, service history, program/service data, documents, and interaction history? Please also provide estimated record volumes where available.

Answer 17

EMHware will remain as the client record. There may be minor data migration needed for current clients from EMHware (approximately 300 clients).

Question 18

What Marketing Cloud capabilities are expected at go-live, such as campaigns, segmentation, journey automation, email/SMS communication, consent management, or engagement tracking?

Answer 18

Ideally all Marketing Cloud capabilities are expected at go-live. If this is not possible, the priorities are: email communication, campaigns, segmentation, and engagement tracking. Secondary priorities include consent management, journey automation, and SMS communications

Question 19

What self-service capabilities are expected within the Customer Community portal for clients, families, caregivers, or external stakeholders at go-live?

Answer 19

This can be found in the functional requirements document.

Question 20

Will Salesforce Scheduler replace existing scheduling tools, or is it expected to coexist and integrate with current scheduling processes and systems?

Answer 20

Salesforce Scheduler is expected to replace existing processes/tools. There are no current scheduling tools other than manual processes using outlook and excel as outlined on the "Current State FFS Journey" in Schedule G on the RFP.

Question 21

Beyond the functional requirements workbook, please confirm the specific business capabilities that must be included in the MVP release versus those that can be delivered in later phases.

Answer 21

All "must have" items from the functional requirements document should be made available in the MVP release and all "nice to have" items can be delivered in later phases if applicable.

Question 22
Please provide the expected number of internal Salesforce users by role/persona and the estimated number of external portal/community users.
Answer 22
Approximately 45 staff users

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

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 23
What are the expected support coverage hours, SLAs, and escalation requirements during the one-year post-implementation support period?
Answer 23
Support of the platform is expected during business hours (M-F), with same day response, next day resolutions of urgent issues. Please provide your standard SLA and escalation procedures for consideration.

Question 24
Please confirm whether Kerry's Place is open to an onsite-offshore or hybrid delivery model, where key client-facing roles may be Canada-based/onsite as required and delivery/configuration/support resources may work offshore or remotely.
Answer 24 Provided within Amendment 2 – Question 8.

Question 25
General: Regarding the insurance requirement, we currently have coverage for up to $1M for commercial and general liability insurance but are open to adjusting. Do you foresee this being a challenge/blocker?
Answer 25
Yes, we require a minimum of $5 million in commercial general liability coverage.

Question 26

General: What is driving the timeline for Phases 3 and 4 in the RFP? Note that these are quite aggressive timelines given the requirements, so curious to better understand how the timeline was decided upon.

Answer 26

We have a grant that we are using to support this project and there are KPI's associated with this project that need to be met by the end of this fiscal year (March 31 2027).

Question 27

General: Given the budget and timeline constraints listed in the RFP, are you open to a phased proposal that focuses initially on "must have" requirements, with "nice to haves" being implemented at a later phase?

Answer 27

Yes, we are open to a phased approach for implementation.

General 28

General: What are the primary drivers for this project? What are the key pain points that you're hoping to solve? Put another way, if you were 6 months post-launch and the project was wildly successful, what will the day-to-day look and feel like for your team?

Answer 28

The key objective of this project includes enhancing customer experience by enabling automated registration and payment processes as well as improving the backend efficiency for staff by reducing manual processes. We also hope to improve marketing capabilities and lead generations through this project. The successful proponent for this engagement will improve data flow, reduce manual handoffs, enhance client experience, and enable reliable reporting across the full-service lifecycle.

Question 29

Leads and Marketing: Roughly how many inquiries or leads do you get per month, and through which channels (web, phone, email, in person)?

Answer 29

Each month, we receive an average of 809 campaign leads (currently defined as clicks to MCH) and an average of 373 webform inquiries to Intake. Those numbers are expected to grow with increased marketing.

A total of ~5,000 contacts were received via our Intake team last year, however this is for all Community Services at Kerry's Place and not specific to the priority programs being identified for initial implementation in Salesforce.

Question 30
Leads and Marketing: What are the most common reasons leads don't convert, and do you have data on that today or is this net-new?
Answer 30
There is limited data on conversions, and the reasons leads don’t convert, so much of the data will be net-new. Anecdotally (from the Intake team) approximately 80% don’t convert because we don’t offer two sought after services (speech-language pathology and occupational therapy) that enable a ‘one-stop shop’ for families. Feedback from teams has also indicated that the customer journey for some programs can be time-consuming or onerous.

Question 31
Intake and EMHWare: Walk us through intake today (forms, approvals, eligibility, account creation) and where the manual handoffs and delays live.
Answer 31
This information can be found in Schedule G of the RFP “Current State FFS Journey” referencing the technology systems legend at the bottom to indicate which systems are automated and which are manual (excel, word, outlook are all manual processes).

Question 32
Intake and EMHWare: What has to be true for an EMHware profile to be "created," and can EMHware accept data via integration, or is it manual or templated upload only (does it have an open api)?
Answer 32
Information back into EMHware is expected to be minimal. This will be done via manual template load. EMHware does have an API.

Question 33
Intake and EMHWare: Please describe the boundaries between Salesforce and EMHware as it pertains to client data/clinical records.
Answer 33
EMHware will not be replaced by Salesforce as the client record however there may be minor data migration needed for current clients.

Question 34
Intake and EMHWare: For consent forms and service agreements, do you need a formal e-signature tool with an audit trail?
Answer 34
Please refer to the functional requirements document.

Question 35
Intake and EMHWare: How many different intake and registration forms do you have, and do any forms or communications need to be offered in languages other than English (French, for example)?
Answer 35
Please refer to the functional requirements document.

Question 36
Intake and EMHWare: How many teams do inquiries need to route to?
Answer 36
3 teams for service provision (Intake, Clinical and Learning & Development).

Question 37
Scheduling: Do clients self-book today or is scheduling staff-mediated? Is the intention to move to a fully self-serve model, or do you anticipate some staff supported scheduling?
Answer 37
This information can be found in Schedule G of the RFP “Current State FFS Journey” referencing the technology systems legend at the bottom to indicate which systems are automated and which are manual (excel, word, outlook are all manual processes).

Question 38
Scheduling: What scheduling and appointment-logging tools are in use today, and are they being fully replaced by Salesforce Scheduler?
Answer 38
This information can be found in Schedule G of the RFP “Current State FFS Journey” referencing the technology systems legend at the bottom to indicate which systems are automated and which are manual (excel, word, outlook are all manual processes).

Question 39
Scheduling: How many staff would we be managing availability for, and does booking need any logic like round robin or skill-based assignment?
Answer 39
There would be approximately 16 staff needing their schedules to be managed initially. Please refer to the functional requirements document for scheduling requirements.

Question 40

Scheduling: Roughly how many programs are running at any given time, and how many sessions get scheduled in a typical month?

Answer 40

There will be 3 programs using Salesforce Scheduler (Intake, Clinical and Learning & Development). All team members regardless of program aim to fill 30 hours (of 37.5) per week of direct services.

Question 41

Portal and Website: When the RFP talks about clients managing services within the Kerry's Place website, is the vision a branded client portal (Experience Cloud?) or do you have a different portal currently?

Answer 41

Yes we will need a client portal, please refer to question #2 for Salesforce modules purchased. We do not currently have a portal for clients.

Question 42

Portal and Website: What's the current website built on, and who would handle changes on the website side? Your team, your web vendor, or the implementation partner?

Answer 42

The website is built on WordPress and Elementor. Which team handles changes will depend on the level and nature of the changes. Content implementation and basic page and form development are managed in-house by the Marketing team. More complex activities such as widget integrations, plug-ins, coding, archiving, overall building, layout, etc. can be primarily managed by our website vendor. Some forms of external integrations will need to be managed by the implementation partner.

Question 43

Portal and Website: Roughly how many families or clients do you expect to be using the portal at launch?

Answer 43

We anticipate approximately 700 authenticated external users annually.

Question 44

Data, Reporting, Integrations, and Migration: Where would data be migrating from (EMHware, spreadsheets, Constant Contact lists?), roughly how many records, and how far back do you want to go? Any expectations around cleanup or de-duping along the way?

Answer 44

Minor data migration may be required from EMHware for current clients (approximately 300). Clean data will be provided and no additional cleanup or de-duping expected.

Question 45
Data, Reporting, Integrations, and Migration: Roughly how many survey types do you anticipate needing?
Answer 45
Approximately 2-5 survey types
We use primarily descriptor surveys (e.g. multiple choice, rating, ranking and open-ended) but based on our business goals, its possible we will later consider expanding survey types and consider longitudinal surveys to track changes over time, and more open-ended exploratory surveys. Examples of current surveys include:

- Multiple program-specific feedback surveys (i.e.. How did you hear about us? / How did we do?) – short-form using multiple choice, rating
- Annual family survey – long-form using multiple choice, open-ended
- As-needed program-specific surveys – generally long-form using multiple choice, rating, ranking, open-ended
- Forms – event registration, feedback/complaints, requests

Ideally, we will be able to migrate select surveys from the current Achievers survey platform, though it's not essential.

Question 46
Data, Reporting, Integrations, and Migration: The partner requirements mention Microsoft infrastructure (MS Server, SQL). Does that mean some of the systems we'd be migrating from or integrating with are hosted on-prem or on SQL?
Answer 46
Microsoft infrastructure is provided for informational purposes. No migration from a SQL database is expected. KPAS leverages a variety of SAAS cloud services (I.e. EMHware).

Question 47
Data, Reporting, Integrations, and Migration: Of all the systems in play—EMHware, Freshbooks/Stripe, the website, MyCommunityHub, M365, Teams/Zoom, Google Analytics, Tableau—which are must-have for go-live versus later?
Answer 47
Please refer to Schedule G "Current State System Architecture"

The only system that will be completely replaced by Salesforce is MyCommunityHub. Kerry's Place is open to recommendations on the replacement of Freshbooks/Stripe as outlined in the functional requirements document.