

**REQUEST FOR PROPOSALS**  
**WEST VIRGINIA HIGHER EDUCATION POLICY COMMISSION**  
**RFP# 23173 IT SUPPORT SERVICES FOR SALESFORCE**  
**ADDENDUM#1 NOVEMBER 16, 2022**

| Question | RFP Section | RFP Paragraph | Vendor Question  | WVHEPC Response  |
|----------|-------------|---------------|--|--|
| 1        |             |               | How many Salesforce licenses do you have?  | We have 14 Salesforce licenses.  |
| 2        |             |               | How many Salesforce licenses do you have?  | see answer to question 1   |
| 3        |             |               | Do you expect any growth in salesforce licenses over the next two months?  | There may be a need to increase Salesforce licenses by 1 or 2.   |
| 4        |             |               | What clouds are being used? Ie Sales Cloud, Service Cloud, Marketing Cloud   | We are using the Service Cloud Enterprise edition in the Government Cloud Plus for Salesforce and the Salesforce Community portal. |
| 5        |             |               | What kind of support do you have in place today internally?  | Currently have 4 programmers on staff but with no previous Salesforce development experience.                                      |
| 6        |             |               | Are there an integrations to other systems?  | There is a middleware that connects to an Oracle database; no other integrations are currently in place.                           |
| 7        |             |               | Are there any third party add ons?   | Currently there are no third party add ons.  |
| 8        |             |               | Is there any custom code?  | There is some customization that was done with the Salesforce platform developed by Enovational.                                   |
| 9        |             |               | Any reporting outside of standard Salesforce reporting?  | There is currently no reporting being used outside of Salesforce reporting.  |
| 10       | NA          | NA            | Can the Proposer (prime vendor) partner with other sub-contractor to bid for this RFP?   | Please refer to Exhibit B Section 26 (page 14) for information regarding use of subcontractors.                                    |
| 11       | NA          | NA            | Can the vendor deliver this in onsite and offshore model? Can we have technical experts from offshore also work on the delivery of the project after winning?                  | Work can be done remotely but it must be done within the United States.  |
| 12       | NA          | NA            | Apart from mentioned insurance, do we need to have any additional insurance?   | Please refer to Exhibit B Section 6 (page 11) for information regarding use of subcontractors.                                     |
| 13       | 3           | 3.1.3         | Assuming the projects will be prioritize and based on the teams will be expected to complete   | Any new projects will be prioritized and successful vendor will need to submit a statement of work to be approved by DFA           |
| 14       | 3           | 3.1.4         | Help line is already setup or will it be part of the RFP?  | The vendor will be required to establish their own helpline  |
| 15       | 3           | 3.1.4         | Assuming the help line will be in EST hrs only?  | Our business hours are EST and would expect a helpline to be available during our business hours 8am-5pm Monday - Friday.          |
| 16       | 3           | 3.1.1         | If selected, do you have documentation of existing system, user manual, system design, integration/data flow diagrams, and any other?  | No, there is no documentation.   |
| 17       | NA          | NA            | Can you please provide list of tools used for project executions   | Windows scheduler to run middleware.   |
| 18       | NA          | NA            | Generally, we recommend Agile methodologies for project execution, do you follow the same ?  | We do not use Agile methodologies.   |
| 19       | NA          | NA            | In case of remote resources, do they need to be in specific timezone?  | No   |
| 20       | 3           | 3.1.1         | What edition of Salesforce is in use?  | We are using the Enterprise Edition.   |
| 21       |             | 3.1.1         | Number of Salesforce licenses?   | See answer to number 1.  |
| 22       | 3           | 3.1.1         | Can we org health score for current instance?  | Unsure   |
| 23       | 3           | 3.1.1         | Can we have number for following<br>1. Apex Classes<br>2. Process Builders<br>3. Validation Rules<br>4. Custom Objects<br>5. Installed Packages<br>6. Integrations (3rd Party) | 1. 28 Apex classes 2. 12 active process builders 3. 29 validation rules 4. 13 custom objects<br>5. Unsure 6. no integrations       |
| 24       | 3           | 3.1.1         | Current test coverage %, and number of failure test classes  | We have not conducted any type of automated testing.   |
| 25       | 3           | 3.1.1         | Can we have number of records for each majorly (high impacted) objects in org  | The system went live July 1. Currently a little over 5,000 contacts and 2,000 accounts.  |
| 26       | 3           | 3.1.1         | Can we have number of fields for each majorly (high impacted) objects in org   | 650 fields in the highly impacted objects  |
| 27       | 3           | 3.1.1         | Any data sync running in real/scheduled time?  | There is a middleware that runs every 15 minutes.  |
| 28       | 3           | 3.1.1         | Will existing vendor stay or leave? If leaving, how will the transition/KT will take place?  | The previous vendor has left already.  |
| 29       | 3           | 3.1.1         | For students, do you use Salesforce communities or external system are integrated  | For students, we use Salesforce community.   |
| 30       | 3           | 3.1.1         | Any immediate or on-hold project needs to handle if we onboard   | See answer to question 85.   |

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| 31       | 17          | 17            | Can you please elaborate the specific laws here   | As stated in Section Exhibit B Section 17: Vendor or approved Subcontractor shall comply with all applicable federal, state, and local laws, regulations, and ordinances. By submitting a bid, vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances.               |
| 32       | 18          | 18            | Can we have arbitration to resolve any conflicts  | Refer to Exhibit B Section 18 (page 13) regarding Arbitration  |
| 33       | 23          | 23            | In case if any defect is found, that can be taken care in Support process, is that fine?          | We are currently using Salesforce support to resolve any errors that are encountered.  |
| 34       |             |               | What licenses do you currently have?  | See answer to number 2   |
| 35       |             |               | Who implemented your current Salesforce instance?   | Enovational was the company that developed our Salesforce solution.  |
| 36       |             |               | How much is your current Salesforce solution customized with Apex coding?                         | Very little was done with Apex coding  |
| 37       |             |               | What systems are you interfacing with?  | See answer to number 6.  |
| 38       |             |               | Are you using an ETL tool for integrations?   | No.  |
| 39       |             |               | What reports and dashboards are in place?   | There are some custom reports and dashboards that have been developed to monitor amount of usage but the amount of reports and dashboards is not extensive.  |
| 40       |             |               | Do the services need to be provided on-site or can the services be provided remotely?             | Services can be provided remotely.   |
| 41       |             |               | Do you have a Salesforce community (Experience Site)?   | Yes, we have a Salesforce community.   |
| 42       |             |               | Are you using a forms tool?   | No, not to our knowledge.  |
| 43       |             |               | Are you using a marketing tool like Pardot or Marketing Cloud?                                    | No.  |
| 44       |             |               | Are there any document generators and e-signature products in place?                              | No, not connected to Salesforce.   |
| 45       |             |               | Is the current build documented in a way that can be shared upon award of the contract?           | There is limited documentation of the current build.   |
| 46       |             |               | Do you have a current System Administrator/Subject Matter Expert for your Salesforce environment? | See answer to question 5.  |
| 47       |             |               | Is there an expectation of monthly hours to be used?  | bidder should propose the estimated number of hours they plan to provide based on the scope of work outlined in the RFP  |
| 48       |             |               | Does the staff have to be located on-site or offshore location (e.g. India), please confirm?      | See answer to question 11.   |
| 49       |             |               | Please provide what kind of Salesforce support is required and for which Salesforce services?     | The Salesforce Solution went live July 1, 2022; There are currently 4 programmers on staff with limited Salesforce experience. We need a company with Salesforce experience to help troubleshoot issues as they arise, assist staff as we seek improve the Salesforce experience, help expand the capabilities of the Salesforce Solution. |
| 50       |             |               | Please more details @ existing set-up – SF clouds and modules, approx. # of objects, data size    | See answer to question 4. Majority of information in 10 objects. System just went live July 1, 2022 so the data size grows as students utilize the system and have not gone through a full cycle.  |
| 51       |             |               | For implementing new/specific projects, will there be a separate budget for it?                   | Refer to Section 3.1 para 3.1.3 regarding specific projects  |
| 52       |             |               | Please provide list of projects in pipeline and approximate budget planned                        | No list of projects currently in the pipeline.   |
| 53       |             |               | Please provide the list of Tools and Technologies currently being used?                           | See answer to question 6.  |
| 54       |             |               | Number of calls that is expected for helpline support (per day/weekly)?                           | The helpline is not expected to be utilized often except when an issue arises. Since October 1, 2022, we have submitted 2 tickets to Salesforce on errors that have occurred where we needed assistance.   |
| 55       |             |               | Kindly provide the Needed details @ helpline scope-   |  |
|          |             |               | - Number call per day/week  | See answer to question 54  |
|          |             |               | - Break-up of type of helpline requests. If code change/fixing in scope for helpline team         | Vendor should be prepared to provide system related support to the DFA internal team.  |
|          |             |               | - SLA details   | bidder should propose the level of support they plan to provide based on the scope of work outlined in the RFP   |
| 56       |             |               | Support timings apply to central time zone  | All referenced dates/times are EST/ESDT.   |
| 57       |             |               | Kindly provide the needed details @ Technical support –   | See answer to question 54 and question 5.  |
| 58       |             |               | Please share key activities in scope.   | Refer to Section 3.1 (page3) regarding the Services requested  |
| 59       |             |               | Number of tickets handled currently (daily/weekly), Total number of tickets in past 12 months.    | The system went live July 1, 2022. There have been 2 tickets submitted to Salesforce to resolve errors.  |
| 60       |             |               | Any new functionality/upgrade planned in next 6 months to assess impact on system.                | Nothing is currently planned but we would like to expand functionality of the system.  |
| 61       |             |               | What is time window for technical support – 24*5, 24*7, 8*5.                                      | 8am-5pm EST Monday-Friday  |

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| 62       |             |               | Please inform if there an estimation on number of consultants required to support existing system?  | bidder should proposed the estimated number of consultants they plan to provide based on the scope of work outlined in the RFP   |
| 63       |             |               | Based on the plan of new projects, is there an estimate on number of consultants required to support expansion, please confirm?                             | bidder should proposed the estimated number of consultants they plan to provide based on the scope of work outlined in the RFP   |
| 64       |             |               | Is the system interacting with any other system (like order submission to an ERP system), kindly confirm?   | See answer to question 6.  |
| 65       |             |               | Please provide information if any cloud telephony platform being used to support call centre integration with Salesforce?                                   | Our agency currently uses Segra but is not integrated with Salesforce.   |
| 66       |             |               | Please elaborate if the Comission has a term in mind for the RFP? 1 year/2 year/more than 2 years?  | The expected term of the contract is specified in Exhibit B Section 3 of the RFP (page 11)   |
| 67       |             |               | Please advise if the Commission will allow IT Support services (as per the scope of this RFP) to be done from offshore locations?                           | See answer to question 11.   |
| 68       |             |               | Is the Comission looking for IT support services at an onsite location?   | See answer to question 40.   |
| 69       |             |               | Could the Comission please elaborate if they will accept references from private/commercial sector?   | Refer to Section 4.5 (page 4) for information on providing references.   |
| 70       |             |               | Does the Comission need vendors to provide training services as part of the scope of work required under this RFP?  | Yes, training would be needed as projects or issues arise.   |
| 71       |             |               | Do you have a project start date and end date?  | The Target award date of the contract is specified in Section 1.3 the Schedule events (page 2). The expected term of the contract is specified in Exhibit B Section 3 of the RFP (page 11).  |
| 72       |             |               | Does the Commission prefer a fixed bid or a time and material-based pricing model for this contract?  | Refer to Section 5 para 5.1 (page 4) for Bidder Response and Evaluation Criteria   |
| 73       |             |               | When does the Commission anticiapte to complete vendor shortlisting?  | Refer to Section 1.3 (page 2) for the schedule of events   |
| 74       |             |               | Are there any liquidated damages/penalties in the contractual engagement? If yes, could the Commission please describe the quantum / percentage?            | No   |
| 75       |             |               | Does the Commission have any reservation/preference for MBE/WBE/SBE enterprises? If So, what is the percentage?   | No   |
| 76       |             |               | Could the Commission please elaborate if the will accept electronic signatures?   | Yes, we do allow certified digitally signed documents.   |
| 77       |             |               | Could the Commission please share the vendor shortlisting date?   | Refer to Section 1.3 (page 2) for the schedule of events   |
| 78       |             |               | Does taking exceptions to the contract will make a proposal non-responsive?   | Refer to Exhibit A Section 11 (page 8) for instructions to bidders regarding Exceptions and Clarifications.  |
| 79       |             |               | Could the Commission please elaborate on the current ERP system in place? When was it implemented?  | The Salesforce solution went live July 1, 2022.  |
| 81       |             |               | Could the Commission please elaborate on their Salesforce technology plans for the next 5 years?  | See answer to question 79.   |
| 82       |             |               | Could the Commission please suggest their internal project team composition for the Sales Cloud Implementation Project?                                     | There are no specific plans as the current solution went live July 1, 2022. The agency will be exploring ways to maximiz the Salesforce technology.  |
| 83       |             |               | What kind of support can vendor expect from Commission's internal project team?   | The Commission has 4 programmers on staff to assist with maintaining Salesforce.   |
| 84       |             |               | Which applications are part of your IT landscape?   | See answer to question 82.   |
| 85       |             |               | Are there any specific issues, problems or automation that you want to resolve in the current system?   | See answer to question 4 and 6.  |
| 86       |             |               | Can you please share a high level desciption of processes that need to be automated?  | Currently need assistance with minor issues. One example is the initial email students receive when creating a Community Salesforce account routinely is received in the student's spam/junk folder. Would like assistance in automating emails. |
| 87       |             |               | Will business team be a part of the discovery sessions?   | We have an internal team that would be available to help the winner of the bid become familiar with the business processes.  |
| 88       |             |               | What is the time commitment/availability for the discovery sessions from the Business/IT Teams? (e.g. 1-2 hours a day)                                      | The internal team will work with the winner of the bid to find the appropriate times for discovery sessions.   |
| 89       |             |               | What is the preferred time zone for the WV IT Teams to schedule the discovery sessions?   | See answer to question 61  |
| 90       |             |               | Would West Virginia be okay to have implementation team distributed across multiple geographies for cost optimization? Do you have any location preference? | See answer to question 11.   |
| 91       |             |               | Do you need the team to support enhancements in West Virginia? Or is it ok if this team is based in other US city?  | See answer to question 40.   |
| 92       |             |               | Would you be okay to have a team based on hybrid (onshore/offshore) model for project implementation and support?   | See answer to question 11.   |
| 93       |             |               | With the process improvement, there will be need to have change management Strategy. Will change management be owned by the Commission, Vendor or jointly.  | The Commission will own any improvements made to the system.   |

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|----------|-------------|---------------|--|--|
| 94       |             |               | Based on the requirements provided in the RFP, we recommend Hybrid Agile development methodology, or Do you want to use pure agile methodology or is there any other preferences for West Virginia ?   | There is no preference.  |
| 95       |             |               | What are the major pain areas in terms of the business process that you seek to resolve with this proposal?  | See answer to question 85.   |
| 96       |             |               | Which Salesforce licenses do you have currently? Are you planning to purchase any more licenses?   | See answer to question 1 and 3.  |
| 97       |             |               | How many Internal users (QV IT, Admins, Staff etc.) currently use in the Current Salesforce system?  | See answer to question 1.  |
| 98       |             |               | Do students create their own logins in Salesforce to access their financial aid request?   | Yes, students create their own logins to the Salesforce Community portal.  |
| 99       |             |               | Is the Student Portal configured in Salesforce Experience Cloud/Community? If yes, how many external users access this community?  | Yes, the student portal is configured with Salesforce Community. Currently have 50,000 community logins available, with 8,000 being used so far.   |
| 100      |             |               | Do students have their own logins on the community?  | Yes.   |
| 101      |             |               | Do Financial Aid requests go through approval? Is this process already built?  | Yes, that process is already built.  |
| 102      |             |               | What is the current IT landscape of CRM System i.e. which Third party applications and which of these are integrated with Salesforce? Are these middleware based integrations?   | There are currently no third party applications. There is a middleware connected to an oracle database.  |
| 103      |             |               | Who supports the current Salesforce ecosystem - is it your internal IT Team or an SI? Is there another SI currently managing the Salesforce orgs ? Will there be any dependencies on them to execute scope mentioned in RFP?                             | The Salesforce solution is currently being managed internally. There is no SI currently managing the Salesforce org  |
| 104      |             |               | Would the Commission team address/resolve dependencies & conflicts with other SIs?   | See answer to question 103   |
| 105      |             |               | Is there any dependency on any other business vendor related deliverable/data/process to start this project and How will do the knowledge transfer session.  | See answer to question 103.  |
| 106      |             |               | Could the Commission please provide a list of sample engagements that new vendor team is supposed to work on? E.g Modules/technologies that the vendor team should be capable of supporting.   | See answer to question 85.   |
| 107      |             |               | What are the major technical areas that team will work on e.g. Sales Cloud, CPQ, Service Cloud, Experience Cloud & Marketing Cloud, Tableau, MuleSoft etc.   | See answer to question 4.  |
| 108      |             |               | What type of skills you required for the support team-Eg- Project Managers/ Business Analyst/Salesforce Developers/ middleware/analytics?  | See answer to question 49.   |
| 109      |             |               | Who will do the QA Engagement? Will it be owned by West Virginia, vendor, or jointly? Can we add an additional QA resource for these engagements?  | This can be discussed with the successful vendor.  |
| 110      |             |               | Do you need Tableau Analytics skill as part of the Support Team?   | No, not at this time.  |
| 111      |             |               | Is there any Product backlog available in the current system..? Have you prioritized   | See answer to question 85.   |
| 112      |             |               | Do you use any CI/CD tool for Deployment   | No.  |
| 113      |             |               | How do you capture and track stories - do you use JIRA?  | No.  |
| 114      |             |               | Do you use any backup tool currently ?   | No.  |
| 115      |             |               | Which other 3rd party applications are being used by the Commission? Can you name some of these applications so that we can assign suitable resources with relevant skillsets  | See answer to question 102.  |
| 116      |             |               | Do you expect the Support Team to Release features every Quarter or can it be short releases?  | No established timeframe for releases.   |
| 117      |             |               | What is the Release Calendar ?   | There is no release calendar.  |
| 118      |             |               | Is Monitoring performance of Support/Organisation enhancements a part of this engagement?  | Not at this time.  |
| 119      |             |               | Will you be using or are looking to use appExchange Products   | Currently we are not looking at any appExchange Products.  |
| 120      |             |               | Do you need to migrate, cleanup or deduplicate data? If yes, which objects need to be migrated / cleansed?   | The system just went live July 1, 2022. There should not be a need to migrate and any cleanup should be minimal.   |
| 121      |             |               | Would the Commission consider references of Salesforce enhancements project done for Education Sector organizations only? Will Commission accept Salesforce IT Support services (as per the scope of this RFP) experience from other industries/sectors? | The Commission would consider experience/references outside of the Education sector.   |
| 122      |             |               | Do you need help to manage support cases - where students raise tickets related to processes built in or impacting Salesforce modules?   | No support is needed for student tickets, but there may be assistance to help with issues in the Salesforce Community portal that students use.  |
| 123      |             |               | How many user ticket/support cases will the need to support  | See answer to question 59.   |
| 124      |             |               | Do you need support to manage support cases for Salesforce issues between 8am-5pm in the CST timezone?   | The majority of support cases will be low level and can be answered within a 24 hour period, but need the ability in the rare situations where there is high level priority support case that the company can provide support within normal business hours of 8am-5pm EST Monday-Friday. |
| 125      |             |               | Do you need to build integrations with Third party apps? If yes, which systems?  | See answer to question 102.  |
| 126      |             |               | Do you use middleware to build integrations?   | See answer to question 6.  |

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| 127      |             |               | Question Number 4.4 states that – Describe any related experience.<br>Could the WV Higher Education Policy Commission (“Commission”) please elaborate on what kind of related experience they are looking at. | The Commission is looking for a company with experience in developing Salesforce for other clients. Many functionalities cross sectors. Like setting up automated emails in Salesforce is not specific to the education or government sector.                               |
| 128      |             |               | Are there any restrictions in using our offshore development team for this project?   | See answer to question 11.  |
| 129      |             |               | How long have you been using Salesforce, and which edition is this?   | See answer to question 79. See answer to question 4.  |
| 130      |             |               | Have you built the student portal on Salesforce Experience Cloud or another platform?   | We are using the Salesforce Community Experience.   |
| 131      |             |               | Is this support only for Salesforce Education Cloud? Or are other Salesforce platforms also included?   | See answer to question 4.   |
| 132      |             |               | How many active users are in the Salesforce Org?  | See answer to question 1 and 99.  |
| 133      |             |               | Do you know if there are any integrations included? If yes, please name them.   | See answer to question 6.   |
| 134      |             |               | What Salesforce Cloud(s) is/are in use today?   | See answer to question 4.   |
| 135      |             |               | Does WVHEPC currently utilize Salesforce Non-Profit related functionality? (ex. Education Cloud or Nonprofit Cloud)   | See answer to question 4.   |
| 136      |             |               | Can you provide an architecture diagram for review?   | The winning bid would be able to receive an architecture diagram  |
| 137      |             |               | Does the current Salesforce Org contain custom code?  | Unsure but don't think so.  |
| 138      |             |               | If so, is there documentation regarding the code and functionality?   | No.   |
| 139      |             |               | Does WVHEPC utilize an Experience Cloud portal? Is this the student portal referenced in the RFP?   | We use the Salesforce Community portal where students interact.   |
| 140      |             |               | Does WVHEPC have a list of planned features/projects? Can you share this list?  | See answer to question 85.  |
| 141      |             |               | What other systems, if any, are currently integrated with WVHEPC's Salesforce instance?   | See answer to question 6.   |
| 142      |             |               | What is the makeup of WVHEPC technical staff and general Salesforce capability?   | See answer to question 5.   |
| 143      |             |               | Does WVHEPC have a list of common tickets currently being submitted that can be shared?   | There are 2 tickets submitted to Salesforce. One ticket is validation on fields when a student is updating contact information that is generating an unhandled error. The second ticket where there is an error a flow also when a student is updating contact information. |
| 144      |             |               | How many support tickets on average are created per month?  | See answer to question 59.  |
| 145      |             |               | Is there a list of open items that are unresolved that can be shared?   | See answer to question 143.   |
| 146      |             |               | Please detail the need for Help Desk Service Line.  |   |
|          |             |               | a. Who will have access to this service? Staff, students, etc.?   | Only system administrators.   |
|          |             |               | b. Do you have this currently?  | No  |
|          |             |               | c. What hours are expected for this service?  | 8am-5pm EST Monday-Friday   |
|          |             |               | d. What is the use case for this service?   | See answer to question 124.   |
|          |             |               | e. Is telephone access a firm requirement or would email/service desk portal be sufficient?   | Email/service desk portal would be sufficient.  |
| 147      |             |               | Is WVHEPC amenable to a reasonable rate increase for renewal terms?   | Refer to Exhibit B Section 19 (page 13) regarding Modifications to contracts  |
| 148      |             |               | Is WVHEPC amenable to a minimum number of contractual hours annually as part of this contract?  | No. The Commission will only pay for actual hours delivered.  |
| 149      |             |               | Will there be other vendors maintaining/building applications on the Salesforce platform at your company?   | The Commission has 2 instances of Salesforce. There will not be another vendor maintaining/building applications with this instance.  |
| 150      |             |               | What Agile tools (e.g., Jira, Confluence, Slack, etc.) does the Company currently use to support iterative development?   | None  |
| 151      |             |               | Do you use any tools for version controlling?   | No  |
| 152      |             |               | What tool is being used for Bug tracking?   | None  |
| 153      |             |               | Is there a Salesforce Multi-Org Strategy in place or being implemented?   | No  |
| 154      |             |               | How many End users are using the Salesforce platform?   | See answer to question 1 and 99.  |
| 155      |             |               | How many internal users and what are their license types?   | See answer to question 1 and 4.   |
| 156      |             |               | How many External Users and what are their license types?   | See answer to question 99. They are community users.  |
| 157      |             |               | Is there any Salesforce license optimization strategy adopted?  | No  |
| 158      |             |               | Are any released cycles and processes defined?  | No  |
| 159      |             |               | Do you have any integrations with Salesforce? If yes - What middleware or integration platforms (e.g., MuleSoft) are already in use or planned to be used for integration?                                    | Middleware was developed internally and is in use already.  |
| 160      |             |               | Is there a centralized team managing identity, authorization, and authentication for all the salesforce applications or every application is managed by a different team.                                     | The Salesforce Solution is currently being managed by the staff from the Division of Financial aid and internal programmers.  |
| 161      |             |               | Is there a requirement for tracking the changes to a particular field on a Salesforce Object?   | There is a need to track any changes the vendor makes to a Salesforce object as it may impact the middleware.   |
| 162      |             |               | What tool is being used for Salesforce Release Management (e.g., Copado, Gearset, Salesforce DX)?   | None  |

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|----------|-------------|---------------|--|--|
| 163      |             |               | Is there a third-party solution in place for Cloud encryption gateway technologies? (e.g., Shield)   | No   |
| 164      |             |               | Is there a Salesforce test automation or testing framework currently in use?   | No   |
| 165      |             |               | Do you use any Help desk ticketing tool? If yes – please name them.  | We have utilized Salesforce support ticket system but no internal system.  |
| 166      |             |               | Do you have support level severity and SLAs defined?   | It is not defined.   |
| 167      |             |               | Can you elaborate between declarative and programmatic customizations implemented at your company?   | Enovational completed the development and we do not have documentation on any customization completed in the development of the Salesforce solution.   |
| 168      |             |               | Is your salesforce instance lightning enabled?   | Yes.   |
| 169      |             |               | How are changes tested in your Salesforce instance before being deployed to Production?  | It is tested in the UAT sandbox environment.   |
| 170      |             |               | How do you move changes between Salesforce environments?   | Manually   |
| 171      |             |               | Do you mostly require technical or admin/user related support services? If you can differentiate in percentage?  | It would be technical; internal staff handle user related support.   |
| 172      |             |               | Do you use DevOps in Salesforce or have interest to opt for it in future?  | Not currently but would like to explore more automation.   |
| 173      |             |               | Are you aware about Salesforce governor limits and how do you manage it? (If any)  | We are aware of the limits but have not had to manage it since the Salesforce solution just went live July 1, 2022.  |
| 174      |             |               | How many users do you have for Salesforce?   | See answer to question 1 and 99.   |
| 175      |             |               | What are the key personas that use Salesforce?   | Staff from the Division of Financial aid are the primary internal users while students interact through the Salesforce Community portal.   |
| 176      |             |               | What are the top high level pain points with your current Salesforce footprint?  | Currently the pain point is the Community portal and students being able to successfully create accounts.  |
| 177      |             |               | How long back did you implement Salesforce?  | See answer to question 25.   |
| 178      |             |               | What all Salesforce products are you using? (such as Sales, Service, Communities, CPQ, Commerce, Marketing)  | See answer to question 4.  |
| 179      |             |               | Is any of the Salesforce function exposed to external users such as partners, customers etc.? If yes, please provide high level overview.  | Salesforce Community portal is used to interact with students. Students are able to create accounts, update contact information, apply for state financial aid, track the status of their application, and view award information. |
| 180      |             |               | What all systems Salesforce is integrated with?  | See answer to question 6.  |
| 181      |             |               | Do you use any AppExchange packages? If yes, please list them.   | No.  |
| 182      |             |               | How many instances of Salesforce do you have?  | The agency 2 instances of Salesforce.  |
| 183      |             |               | Do you have a source code control process in place?  | No.  |
| 184      |             |               | How would you classify the overall complexity of your Salesforce instance based on out of the box versus customizations? Please provide a guesstimate percentage.                                  | 75% out of the box and 25% customization.  |
| 185      |             |               | How many APEX classes, workflow rules do you have within Salesforce? High level approximate is sufficient.   | See answer to question 23.   |
| 186      |             |               | Do you anticipate a significant change in current processes in next 1-2 years? How significant (% difference)?   | Not a significant change but we would like to be able to fully utilize the capabilities of the Salesforce Solution. 15%  |
| 187      |             |               | Do you run reporting out of Salesforce?  | Yes, we use reports out of Salesforce.   |
| 188      |             |               | Is your Salesforce function mobile enabled?  | Yes.   |
| 189      |             |               | Do you follow a certain release cycle for migrating changes to Prod?   | No.  |
| 190      |             |               | Do you have a Salesforce DevOps tool that you use for ticketing? Any other source of receiving tickets?  | No.  |
| 191      |             |               | What is the governance model that is in place (steering committee, etc.)? Are there specific gates/signoffs as part of your methodology or testing cycles that are musts and should be considered? | Salesforce Solution is currently managed by staff from the Division of Financial Aid and the programmers from the Division of Policy & Planning.   |
| 192      |             |               | Do you follow waterfall or agile implementation methodology?   | Neither.   |
| 193      |             |               | Do you need help on change management or training?   | Yes.   |
| 194      |             |               | What is your expectation on the support levels in terms of L1, L2 or L3 support?   | Since we just went live on July 1, 2022 with Salesforce and with programmers on staff with no previous Salesforce experience, we are unsure of the level of support we will need moving forward.                                   |
| 195      |             |               | Do you have any Response & Resolution time SLAs already defined?   | No, it is not currently defined.   |
| 196      |             |               | What is your expectation for Support Coverage beyond 8 AM to 5 PM?   | See answer to question 124.  |
| 197      |             |               | Can you please share monthly ticket count by priority wise for the past few months   | See answer to question 59.   |
| 198      |             |               | Which salesforce cloud are you using?  | See answer to question 4.  |
| 199      |             |               | What edition do you have? How many total licenses DFA has and total licenses used at the moment?   | See answer to question 1 and 4.  |
| 200      |             |               | How many users do you have? Internal (staff) and external (students)?  | See answer to question 1 and 99.   |

| Question | RFP Section | RFP Paragraph | Vendor Question  | WVHEPC Response   |
|----------|-------------|---------------|--|---|
| 201      |             |               | What level of access do students have through student portal?  | Students have ability to update contact information, submit and edit applications, view award information, submit cases.  |
| 202      |             |               | Do you have salesforce platform licenses?  | See answer to question 1, 4 and 99.   |
| 203      |             |               | How many projects is DFA running at present in Salesforce?   | There are no current ongoing projects.  |
| 204      |             |               | How many admins are in the division that are accessing Salesforce?   | There are 3 system administrators currently.  |
| 205      |             |               | How many students login to portal during busy season? Is usage seasonal and is MFA enabled? Also, enhanced domain enabled? | The system went live July 1, 2022. The system has not been live long enough to know seasonal patterns but October 1 through March 1 should be the busy season. See answer to question 99. Usage is seasonal. MFA is not enabled. Enhanced domains is enabled. |
| 206      |             |               | How is DFA pulling all the student data?   | See answer to question 6.   |
| 207      |             |               | Please provide details for –   |   |
|          |             |               | a. Use of custom objects (total count)   | See answer to question 23.  |
|          |             |               | b. % of coding (customization on all projects)   | See answer to question 184.   |
| 208      | 4           |               | If a vendor provides one client reference for large, complex federal program would that be sufficient?                     | Refer to Section 4.5 (page 4) for instructions on providing references.   |
| 209      |             |               | What is the budget for this project?   | We do not disclose budgets on RFPs  |
| 210      |             |               | Who is the current incumbent?  | See answer to question 28 and 35.   |
| 211      |             |               | Can the services be performed remotely?  | See answer to question 11.  |
| 212      |             |               | Could you please explain the <b>Help Line Service cost</b> in detail?  | Vendor should propose any and all costs of providing a Help Line.   |