

February 10, 2026
Rhode Island Commerce Corporation
REQUEST FOR PROPOSALS

Solicitation Number: **RFP-2601**

ADDENDUM NO. 1

Questions & Answers

REQUEST FOR PROPOSALS
Salesforce Consulting Services

The Rhode Island Commerce Corporation (“Corporation”) seeks proposals from qualified firms to implement and customize Salesforce solutions and provide on-going support for system maintenance, system upgrades, and required fixes for the Corporation’s Salesforce Customer Relationship Management (CRM) system (“Salesforce”).

Question 1: What Salesforce edition is currently in use (e.g., Enterprise, Unlimited, Government Cloud)?

Answer: Sales & Service Cloud - Enterprise Edition

Question 2: How many custom objects, flows, and Apex components currently exist in the Salesforce environment, and can you provide a high-level overview of their relative complexity?

Answer: 51 custom objects, 21 active flows, 18 apex triggers.

Question 3: What sandbox environments are available, and how are they used?

Answer: Available sandbox licenses – 25 Developer, 1 Partial Copy.

Question 4: Do you anticipate growth beyond the current ~30 users during the contract term?

Answer: No, not at this time.

Question 5: Are all departments using a single org or segmented by function?

Answer: Single Org.

Question 6: Which third-party systems are currently integrated with Salesforce?

Answer: D&B Connect, D&B Hoovers, HubSpot.

Question 7: Has a Grant Management solution already been selected, or is vendor guidance expected?

Answer: The Corporation recently issued RFP-2602 – Grant Management Software Solutions. Please refer to www.commerceri.com for additional information.

Question 8: Are integrations real-time, batch, or manual today?

Answer: Integrations appear to currently be batch. Proposers should propose what is reasonable for integration based on the system design and project scope.

Question 9: Does the Corporation anticipate a minimum number of monthly support hours as part of the ongoing services described in this RFP?

Answer: We estimate 5-10 hours per month. The expectation is that a portion of those hours, when interacting with Corporation staff, will be during normal business hours (8:30 – 4:30 EST).

Question 10: Please identify the primary types of Salesforce-related requests received by the Corporation and, where possible, provide any available quantitative or historical data related to request volumes to support accurate service planning and pricing.

Answer: This information is not currently available.

Question 11: Are there specific regulatory or compliance requirements vendors must follow?

Answer: Please refer to RFP #2601. All services must comply with applicable state and federal laws.

Question 12: What is the current deployment and release approval process?

Answer: When applicable, modifications are tested in a Salesforce Sandbox and then moved to production.

Question 13: What tools does the Corporation currently use for project tracking, support request management, documentation, and team collaboration?

Answer: No tools are currently in use specifically for Salesforce related projects.

Question 14: Is the Corporation open to a retainer-based model with variable usage?

Answer: Yes, that may be a consideration.

Question 15: Please clarify whether onsite presence is required for any portion of the services described in this RFP, or if remote delivery is acceptable for the duration of the engagement.

Answer: Remote delivery is acceptable for the duration of the agreement.

Question 16: Please confirm whether service level agreements (SLAs) are required as part of this engagement and, if applicable, provide details regarding the expected response times, resolution targets, and performance metrics.

Answer: Proposers should provide response timeframes.

Question 17: Regarding Section 14 of the Instructions to Proposers (Page 6), our firm, is currently incorporated in the State of Virginia. We understand the Certificate of Authority from the Rhode Island Secretary of State is only required for the successful bidder. Can the Corporation confirm that proof of an active registration in our home state (Virginia) is sufficient for the initial proposal submission, and that the Rhode Island-specific filing only needs to be initiated after a tentative award is announced?

Answer: Yes, Rhode Island specific filing can be completed after the tentative award is announced.

Question 18: Is Rhode Island Commerce open to awarding to multiple high-scoring vendors, or would it prefer to award only one single vendor?

Answer: The Proposer with the highest score will be selected as per the Corporation's purchasing guidelines.

Question 19: Is there an incumbent vendor currently providing these services? If yes, would Rhode Island Commerce please share the name of the incumbent vendor?

Answer: No incumbent vendor is currently providing these services.

Question 20: Could you please provide insight into the existing Salesforce Cloud(s) and Salesforce Products along with the number of Salesforce Orgs?

Answer: Please refer to Question #1 and Question #5.

Question 21: Could we propose our own labor categories and rate card, or does Rhode Island Commerce have a preferred template?

Answer: Yes, vendors may propose their own labor categories and rates.

Question 22: Is Rhode Island Commerce seeking on-site support or is remote work (within the CON-US) acceptable?

Answer: Remote work within the continental US is acceptable.

Question 23: Is there a budget or a budget range that the RI Commerce department has for this project that the Salesforce partner needs to stay within?

Answer: Proposers should submit a cost proposal they believe is appropriate to achieve the scope and deliverables outlined in the RFP. Proposals will be evaluated in accordance with the Evaluation Criteria set forth in the RFP.

Question 24: When is the award for this RFP expected and when is work expected to start and how long will the work go for?

Answer: The award is expected immediately following board approval. The engagement is expected to begin during Q2 2026. The expectation is for a 1-year contract.

Question 25: Does the Rhode Island Commerce Corporation accept proposals from firms that utilize team members located outside the United States? ECHO Technology Solutions has Salesforce-certified consultants based in Europe (Bosnia and Herzegovina). All team members are fully certified with extensive experience serving US nonprofit clients.

Answer: The preference is for domestic consultants. All services must comply with applicable state and federal laws.

Question 26: What third-party systems are currently integrated with Salesforce (if any), and what additional integrations are anticipated during the contract term?

Answer: Please refer to Question #6.

Question 27: Can you provide an overview of current customizations in the Salesforce org? Specifically: number of custom objects, active Flows/Process Builder automations, any Apex code or custom Lightning components, and whether legacy Workflow Rules are still in use.

Answer: Please refer to Question #2.

Question 28: The RFP mentions "Salesforce Public Sector Solutions Grant Management tools integration." Can you clarify whether this integration already exists, or if this is a new implementation expected during the contract term? What is the anticipated scope and timeline?

Answer: No, the integration does not exist. Please refer to Question # 7.

Question 29: Are there known data quality challenges (duplicate records, inconsistent data entry, legacy data issues)? Is any data standardization or migration expected?

Answer: There may be some data quality challenges. We expect the vendor to offer solutions regarding data standardization.

Question 30: How long do you expect the proposal to be

Answer: There are no page limit or length restrictions for the proposals.

Question 31: Can you provide more details on the budget constraints or funding availability

Answer: Please refer to Question #23.

Question 32: What are the anticipated changes in project scope or priorities*

Answer: This information is not currently available.

Question 33: Can you detail any previous challenges encountered in similar projects

Answer: This information is not currently available.

Question 34: What were the challenges with the previous solutions

Answer: Please refer to Question #33.

Question 35: Is there an incumbent? How much was their contract worth?

- a. Is the incumbent allowed to bid on the contract?

Answer: Please refer to Question #19.

Question 36: Do commercial or government references carry different significance

Answer: Please refer to the Criteria for Selection section and Evaluation Criteria of RFP #2601.

Question 37: Are there any additional/optional features you would desire

Answer: Please refer to the Scope of Work section of RFP #2601.

Question 38: Is there an ideal timeline?

Answer: The Scope of Work is estimated to be completed during the 12-month term of the vendor contract.

Question 39: Have you worked with any vendor to do market research/put together this RFP.

Answer: No, the Corporation has not worked with a vendor to perform market research and/or create this proposal.

Question 40: When do you expect this RFP to be awarded

Answer: Please refer to Question #24.

Question 41: Are you interested in a vendor who has GSA Schedule pricing?

Answer: Yes, that would be acceptable. .

Question 42: Looking for in person training or virtual?

Answer: Virtual training is acceptable. Please also refer to Question #15.

Question 43: When is the expected award date

Answer: Please refer to Question #24.

Question 44: Are Key Personnel allowed to work remotely?

Answer: Please refer to Question #15.

Question 45: We would like to kindly request a 1-week extension in order to provide a comprehensive response to this RFP.

Answer: There are no extensions to the RFP submission deadline. All proposals must be submitted by the date and time specified in the RFP.

Question 46: Is there any software that the state preferences?

Answer: The Corporation has no preferred software. Any recommended tools or plugins that support the Scope of Work will be reviewed for suitability.

Question 47: Upon Award-decision what kind of feedback can bidders expect to get on proposal submissions

- Contractually speaking would the state be obligated to provide vendors with feedback?

Answer: The Corporation is not required to provide individual feedback on the proposals.

Question 48: Do you need a UAT/Sandbox?

Answer: Please refer to Question #3.

Question 49: The RFP references 'Silver Level' certification, which is now categorized under the 'Crest' tier in the current Salesforce Partner Program. Given that tiers are now calculated quarterly via the Trailblazer Score (Customer Success, Innovation, Growth, and Lead), will the Corporation consider a partner's trajectory and specific 'Customer Success' pillar score in lieu of a long-term Crest/Silver designation?

Answer: Yes, that may be a consideration.

Question 50: Would the Corporation accept a 'Base' tier partner that demonstrates a high Trailblazer Score in 'Customer Success' (CSAT) as a substitute for the years-of-certification requirement?

Answer: Yes, that may be a consideration.

Question 51: How will the Corporation weigh the CSAT rating (Client Satisfaction) relative to the partner tier? For example, will a Base partner with a 4.9+ CSAT be scored competitively against a Crest partner with a lower satisfaction rating?

Answer: Please refer to Question #49 and #50.

Question 52: Will the Corporation consider verified AppExchange reviews and testimonials as equivalent documentation for client satisfaction if a formal Salesforce-measured CSAT score is unavailable for specific recent projects?

Answer: Yes, that may be a consideration along with the Evaluation Criteria contained in RFP #2601.

Question 53: Regarding the 'Percentage of Proposer's consultants certified at Sales Cloud Level,' does the Corporation have a minimum headcount requirement for the project team, or is the focus strictly on the ratio of certified individuals assigned specifically to this engagement?

Answer: The Corporation does not have a minimum headcount requirement for the project team.

Question 54: Will the Corporation recognize other relevant certifications (e.g., Salesforce Certified Platform Administrator or Public Sector Solutions Accredited Professional) as contributing to the 'Staff Credentials' score, given the project's focus on government-specific solutions?

Answer: This information may be considered along with the Evaluation Criteria section of RFP #2601.

Question 55: What's the expected monthly demand (average # requests/tickets, or an estimated hours/month budget)?

Answer: Please refer to Question #9.

Question 56: Do you expect steady-state support every month, or periodic bursts tied to initiatives/grant cycles?

Answer: Please refer to Question #9.

Question 57: Is there a minimum monthly consulting requirement you intend to set?

Answer: Please refer to Question #9.

Question 58: What Salesforce edition is in use (and is API access enabled in the current licenses)?

Answer: Please refer to Question #1.

Question 59: Provide current-state overview: # objects, # flows, # active automations, # record types, # profiles/permission sets, and any known pain points.

Answer: Please refer to Question #2.

Question 60: How much custom code exists (Apex classes/triggers/LWC) and what is current test coverage?

Answer: Please refer to Question #2.

Question 61: What environments exist today (sandboxes types/count) and what's the release/deployment method?

Answer: Please refer to Question #3 and Question #12.

Question 62: How many enhancement "task items" do you anticipate in Year 1, and how are they sized (S/M/L)?

Answer: This will vary based on the scope of work and proposers' recommendations.

Question 63: Any known "must deliver" items in the first 90 days?

Answer: Unknown at this point.

Question 64: How many integrations are in scope (current + planned), and what systems (grants, finance/ERP, email marketing, website forms, document mgmt, BI, etc.)?

Answer: There are no integrations currently in scope.

Question 65: Are integrations real-time or batch, and are there SLAs for latency/availability?

Answer: Please refer to Question #8 and Question #16.

Question 66: Is there existing middleware (MuleSoft, Boomi, Informatica, Azure, etc.) or do you want direct point-to-point only?

Answer: No, there is no existing middleware.

Question 67: For “identify third-party apps,” do you already have preferred vendors/products, or is this open-ended evaluation?

Answer: We expect the proposal to identify what is appropriate based on the scope of work.

Question 68: Is PSS Grant Management already licensed? If yes, what is already configured vs net-new

Answer: No. The Corporation does not have PSS Grant Management licenses.

Question 69: How many grant programs/process variations are in scope (intake, eligibility, review, scoring, awards, amendments, reporting, closeout)?

Answer: There are no grant programs currently managed in Salesforce.

Question 70: Any portal/external applicant needs, or internal-only

Answer: No. Internal licenses only.

Question 71: What are the required security controls: SSO provider, MFA policy, password/IP policies, audit logging expectations, encryption requirements?

Answer: The current configuration for the Corporation’s Salesforce system is using the Salesforce authenticator app for MFA. There is no SSO, MFA is required at each login. There are no IP limitations or specific audit logging requirements. Given that this is accessed through a browser, it is under SSL, and whatever default encryption at rest that Salesforce provides is in use.

Question 72: Any regulatory/compliance constraints (state IT standards, data residency, retention schedules, public records requests)?

Answer: All services must comply with applicable state and federal laws, including relevant IT standards, data retention requirements, and public records obligations.

Question 73: Any data migration expected under this support contract (backfill, clean-up, imports from external sources)?

Answer: This may be considered.

Question 74: What are the top KPIs and who owns definitions? Do you need historical snapshots or trend baselining?

Answer: Not applicable to the Corporation's current usage.

Question 75: Any reporting tool beyond native Salesforce (Tableau/Power BI), or Salesforce-only?

Answer: Currently Salesforce only.

Question 76: Who provides UAT testers and what is their availability window per release?

Answer: User Acceptance Testing is typically performed by internal users.

Question 77: What's the defect severity model and expected fix turnaround?

Answer: This information is not currently available.

Question 78: Training: how many user groups, expected frequency, and do you need recordings/job aids/admin runbooks?

Answer: To be determined based on business unit needs.

Question 79: Who is the decision-maker and what are decision SLAs (e.g., 48–72 hours for approvals)?

Answer: The Administrator along with business unit leader as required.

Question 80: Are there any fixed dates/events (board reporting, grant cycles) that dictate release timing?

Answer: Not currently.

Question 81: Any constraints on working hours, change windows, or blackout periods?

Answer: Not currently.

Question 82: What is the anticipated average number of support hours required per month?

Answer: Please refer to Question #9.

Question 83: Which specific third-party applications are currently integrated or planned for integration?

Answer: Please refer to Question #6.

Question 84: Is the "Public Sector Solutions Grant Management" integration a new implementation or an optimization of an existing setup?

Answer: Please refer to Question #68.

Question 85: Is there a designated not-to-exceed budget or set fund allocation for the initial annual agreement?

Answer: Please refer to Question #23.

Question 86: Are there specific caps or guidelines for "Travel and Administration" expenses beyond state/federal statutes?

Answer: The Corporation's Board approved a travel and expense policy that is for staff members specifically and may be utilized by vendors as a guideline if the Corporation deems it appropriate.

Question 87: Does the Corporation have a specific policy or preference regarding the use of offshore resources?

Answer: Please refer to Question #25.

Question 88: What is the expected Service Level Agreement (SLA) for "as needed" support and "required fixes"?

Answer: Please refer to Question #16.

Question 89: What specific documentation is required to demonstrate "good faith efforts" if the 15% MBE goal cannot be met?

Answer: Please reach out to the Division of Equity, Diversity & Inclusion for further guidance.

Question 90: Can the Corporation provide a list of Rhode Island-certified MBE/WBE firms with Salesforce expertise?

Answer: Please refer to the Division of Equity, Diversity & Inclusion website for a directory of MBE/WBE businesses - <https://dedi.ri.gov/division-units/minority-business-enterprise-compliance-office/directory-search>.

Question 91: Which Salesforce Edition (e.g., Enterprise, Unlimited) is currently utilized for the 30 internal users?

Answer: Please refer to Question # 1.

Question 92: What is the anticipated award date and the targeted start date for the contract?

Answer: Please refer Question #24.

Question 93: Is labor offshoring allowed?

Answer: Please refer to Question #25.

Question 94: Does the proposed team of professionals need to include the entire team? Without a work start and end date, defined staff and their availability may be difficult to ensure. Would representative samples or resumes for some team members be acceptable?

Answer: Yes, that is acceptable.

Question 95: How many SFDC applications are to be supported?

Answer: Please refer to Question #6.

Question 96: Size of incumbent Support Team

Answer: 1 person.

Question 97: Live since date

Answer: 2013/2014

Question 98: Salesforce flavour (Sales cloud, Service cloud, Marketing cloud, Experience Cloud, Industry Cloud etc.,)

Answer: Please refer to Question #1.

Question 99: Support coverage (24 x7, 24 x 5, 8 x 5....)

Answer: Not currently required.

Question 100: Number of User provisioning requests

Answer: Not applicable to the Corporation's current usage.

Question 101: Interfaces / Integration touch points

Answer: This information is not currently available.

Question 102: Level of customisation (Low, Medium, High)

Answer: Current level of customization is estimated to be low.

Question 103: Any additional language support required other than English

Answer: No, not currently.

Question 104: Do the scope include Mobility support

Answer: No, not currently

Question 105: Volume of priority of the ticket (P1, P2, P3, P4, P5 ...)

Answer: Not applicable to our current usage.

Question 106: Any App Exchange products linked with each apps

Answer: D&B Connect.

Question 107: Is the current version of Salesforce classic or Lightning? If it is classic, do you have any immediate plans to migrate to Lightning? Please share Lightning assessment reports (if any).

Answer: Current version is Lightning.

Question 108: What is the approx. total volume of tickets (Incidents and Service Requests) annually across all the Salesforce applications and indicative % split of Simple, Medium and Complex tickets.

Answer: Currently, there are less than 10 annual service requests submitted to Salesforce Premier Success.

Question 109: Is the request for managed services for L3 incidents, or is it for L1 and L2 as well?

Answer: Not applicable to our current usage.

Question 110: Do you expect the team to work on enhancements of the applications, along with incident fixes? If yes, what is the average level of effort of enhancements per month or quarter?

Answer: Yes, that is the current expectation. It is expected that the average level of effort will vary based on each business unit.

Question 111: Are the applications managed by the internal IT team, or are they managed by multiple different partners? If they are managed by different partners, how many are there?

Answer: Applications are currently managed by the system administrator.

Question 112: Please specify if Support personnel/s can be based outside of US?

Answer: Please refer to Question #25.

Question 113: What are the data privacy requirements to access data from offshore location for support? Are there any access restrictions - VPN availability?

Answer: Please refer to Question #25 and Question #71.

Question 114: What is the onboarding process and duration for any new resource? Eg: Do you require any BG verification, NDA requirements, etc.?

Answer: Not applicable to our current usage.

Question 115: How many reports are currently being used?

Answer: Less than 10 reports are currently being used.

Question 116: How many integrations are currently in use across Salesforce application

Answer: Please refer to Question #6.

Question 117: Can you provide split of real time integration and batch integration

Answer: This information is not currently available.

Question 118: What is your release cadence to production? Is it monthly, quarterly etc

Answer: As needed based on business unit needs.

Question 119: How many lower environments do you have i.e. for Dev, SIT, QA, UAT

Answer: Not applicable to our current usage.

Question 120: Do you have test automation suite in use? If yes, is the support work expected to maintain the test suite?

Answer: No, not currently.

Question 121: Can we request for 2-3 weeks of extension for the submission?

Answer: Please refer to Question #45.

***End of Addendum ***