

RFP for Salesforce Development Support for Decarbonization Programs

SVCE received a large volume of prospective vendor questions in response to this RFP. This document contains:

- Q&A Part 1 (posted on August 31, 2026)
- Q&A Part 2 (posted on September 4, 2026).

Please scroll to see both parts.

Given these additional clarifications, SVCE is extending the deadline for proposals to Thursday, September 10, at 5:00pm Pacific Time.

Questions & Answers -- PART 1 ***Posted August 31, 2026***

1. Before preparing the required narrative and cost proposal, could you please confirm whether an international software company based in Pakistan is eligible to respond? Please also advise whether U.S. business registration, California insurance, specific Salesforce partner status or certifications, and U.S.-based references are mandatory, or whether equivalent international qualifications and references are acceptable.
 - a. **U.S. based is strongly preferred for easier communication with our California based team who work 9am to 5pm Pacific Time. Having the appropriate registration to do business in the United States and California is required.**
2. Section 17 notes that SVCE is interested in additional ideas for features and workflows beyond the listed scope. Would SVCE consider proposals that deliver certain customer-facing components (for example, application intake or applicant status visibility) through SVCE's existing customer-facing web properties, integrated with Salesforce via API, while keeping the Brillion Fulfill package as the system of record and fully preserving its upgradeability?
 - a. **Yes**
3. We understand the Background section directs the selected consultant to work within and extend the Brillion Fulfill package. Separately from a compliant response to the stated scope, would SVCE be open to reviewing an alternative approach in which some or all of the program-management functionality is delivered outside of Salesforce? Or should proposers treat the Salesforce-based architecture as fixed for this RFP?
 - a. **Salesforce architecture as fixed**
4. Can SVCE share the approximate volume of Salesforce development and administration hours used per month over the past year, as a proxy for the expected level of effort?
 - a. **Recent months range 25 to 40 hours**
5. For the AI Enablement scope item, does SVCE contemplate customer-facing deployments (e.g., advisor assist or chat triage exposed to customers), internal-facing use only, or is that direction itself part of the evaluation?
 - a. **Both are under consideration**

6. Section 5, Proposal Submission, does not indicate where Exhibit C: Schedule of Performance, should be incorporated within the proposal. Would including it in the Appendix satisfy this requirement?
 - a. **Yes that's fine**
7. Section 17, High Level Scope of Work, Desired Qualities/Qualifications, identifies certified Platform Developer I/II, Administrator, and Experience Cloud personnel. Will SVCE evaluate the qualifications of the proposed team collectively, including equivalent platform-development experience and other relevant Salesforce certifications, or must each specifically identified certification be held by a named team member at proposal submission?
 - a. **Collectively**
8. Section 17, High Level Scope of Work, Service Model and Level of Effort, requires multiple monthly support tiers between 25 and 100 hours, while Section 5, Proposal Submittal, requires a monthly fixed-fee estimate. Should each tier be priced as a fixed monthly commitment regardless of actual utilization, and may proposers specify that unused hours expire without rollover?
 - a. **We're seeking pricing for a range of packages between 25 and 100 hours per month. Fixed is preferred**
9. Section 17, High Level Scope of Work, Service Model and Level of Effort, requires monthly reporting of hours by task but does not specify which activities count toward the selected support tier. Should project management, backlog and sprint meetings, requirements gathering, functional QA, documentation, training, release support, and third-party coordination all be counted against the selected tier?
 - a. **Please propose what you prefer**
10. Section 17, High Level Scope of Work, Scope of Services, Item 6, Testing and Quality Assurance, states that the consultant must complete end-to-end testing and deliver work to SVCE user-acceptance-ready, and that SVCE staff will not perform functional QA. Will SVCE nevertheless perform business-owner acceptance and authorize production deployment, with the consultant remaining responsible for functional QA, test scripts, results, and defect correction?
 - a. **The intent of that sentence is that the features/functions should be heavily tested by the consultant and not passed to SVCE unless they are thoroughly tested.**
11. Section 5, Proposal Submittal, Proposed Solution, requires proposers to describe a work plan for ongoing management of SVCE's current Salesforce system, while Section 17, High Level Scope of Work, describes new-program development, historical-data migration, integrations, and ongoing enhancements without providing anticipated quantities or volumes. Can SVCE provide approximate ranges for the current backlog, the number of new or substantially modified programs anticipated during the first year, historical-data volumes, and the expected number and complexity of integrations? If this information is unavailable, may proposers identify corresponding volume and complexity assumptions in their proposals?
 - a. **Please make assumptions and specify in the response.**
12. Is there an annual (or other time period) NTE amount that should be taken into consideration when responding to this RFP?
 - a. **The NTE is determined by the services required and cost estimate from the firm. The primary consideration for bidders is what to charge and how many hours are required, or proposing a range of options.**

13. If the prime Consultant maintains the required current SOC II Type II report, is each Salesforce delivery subcontractor also independently required to maintain its own SOC II Type II report?
 - a. Yes
14. If a subcontractor does not directly store or independently process SVCE customer/AMI data outside the prime Consultant's approved systems and security controls, would the prime Consultant's SOC II Type II compliance satisfy this requirement?
 - a. No
15. Are subcontractors permitted to access SVCE Salesforce environments under the prime Consultant's approved security framework, subject to the confidentiality, security, insurance, and other subcontractor requirements contained in the agreement?
 - a. SOC 2 is required for all parties involved
16. Please provide an inventory of the current Salesforce environment, including Salesforce edition and licenses, Brillion Fulfill version and licensed components, custom objects and code, external applications, sandbox structure, deployment tooling, approximate user counts, and the classifications of customer or AMI data to which the selected consultant will have access
 - a. Salesforce Enterprise Edition. 14 salesforce platform licenses, 8 salesforce licenses, 1 salesforce integration license
17. For pricing purposes, what support tier does SVCE anticipate selecting initially, what is the expected allocation of monthly effort among production support, ongoing enhancements, new program development, and migrations, and will there be a minimum commitment or notice period for changing tiers? Please also confirm whether SVCE has minimum defect response or resolution targets by severity.
 - a. We are not sure what support tier we'd pick initially. Please propose minimum defect resolution targets.
18. For each anticipated migration, please provide estimated record counts, attachment counts and storage volume, source formats, number of programs or source organizations, known data-quality issues, retention requirements, and the reconciliation and acceptance criteria SVCE will use.
 - a. It would be in the hundreds of entries range.
19. Please identify the GCP services, API or ETL technologies, synchronization frequency, expected transaction volumes, monitoring tools, and system-of-record ownership for the Salesforce-to-GCP integration, as well as the selected website chat platform and its available Salesforce integration method.
 - a. SVCE currently houses our data warehouse and cloud file storage in Google Cloud Platform through BigQuery and Google Cloud Storage (GCS) Buckets. Currently, we use Brillion's proprietary ETL tool with a connection to our Google Cloud Storage (GCS) Bucket which contains filtered customer attribute data from BigQuery. Two files are sent weekly into Salesforce via this tool. Ideally, SVCE hopes to connect BigQuery or GCS directly to Salesforce via an API connection that will both get (program participation) and post data (customer attribute). The data will continued to be synced weekly, and it is currently unclear the total

transaction volumes (more customer attributes will be added, program participation data snapshots will be sent back weekly into GCS). SVCE currently utilizes many GCP services including but not limited to Cloud Run, Cloud Build, Cloud Run Functions, Cloud Scheduler, and Google Cloud Monitoring. Salesforce contains the true state of all program participation data, and GCP contains the true state of all customer attribute data. The winner of the contract is expected to work with another vendor working in GCP and our internal Data Team.

20. Please describe the anticipated transition from Brillion and any other incumbent providers, including overlap period, access to repositories and documentation, package-vendor support responsibilities, current backlog availability, deployment approval process, user-acceptance criteria, and post-release warranty expectations.
 - a. There will be access to knowledge base / information / documentation. Overlap would be brief possibly 2 weeks with the one vendor. Brillion is on staff for bug resolution so will be available longer.
21. If the subcontractor performing the technical work and handling data is SOC 2 Type II compliant, would that satisfy SVCE's SOC 2 Type II requirement?
 - a. All parties need SOC 2 compliance
22. On average, how many support tickets are submitted each month, and what percentage of effort is typically spent on maintenance versus new development?
 - a. 4-8 tickets per month, 30% on maintenance (estimate)
23. Which web chat solution is planned for the new website, and will it integrate directly with Salesforce?
 - a. To be discussed at the virtual interview stage
24. Approximately what percentage of the Salesforce solution is custom-built, and how many records/files are expected to be migrated?
 - a. Hundreds of records. It is a custom package created by Brillion for utility program management.

Questions & Answers – PART 2

Posted September 4, 2026

25. Can we use a hybrid team model where key leads (Architect, Project Manager) are US-based, supported by offshore developers and QA, as long as all security and SOC 2 Type II requirements are met?

Team members (including developers) outside the United States will not be allowed to have access to confidential information like customer personally identifiable information (PII) or any sensitive data (like AMI data). As noted, all team members, regardless of location, must be SOC2 Type II compliant.
26. Is all work expected to be 100% remote, or will any on-site meetings be required at your Sunnyvale office?

Yes, 100% remote. No on-site meetings required or expected.

27. Is your current org mostly built with standard Salesforce Flows, or is there a lot of custom Apex code on top of the Brillion package?

It is a combination of both.

28. Are the Agentforce / Einstein AI pilot tasks included in the monthly support hours, or will they be scoped and billed as a separate project if approved?

Not included. Will be scoped separate from monthly support, if approved.

29. If a prime contractor utilizes a fully compliant, SOC 2 Type II certified subcontractor for technical execution and data handling, does that satisfy SVCE's SOC 2 Type II compliance requirement?

No. SOC 2 is required for all parties (prime and sub) involved.

30. Could you please confirm whether the registered partner must be the prime contracting entity, or whether it may participate as a subcontractor/teaming partner to ASTACKRA?

Yes, the registered partner must be the prime contracting entity.

31. Must the required \$5 million privacy and cybersecurity liability coverage be in effect when the proposal is submitted, at contract execution, or before services commence? Would an affidavit of insurability be sufficient with the proposal?

This is specified in Section 12 of the RFP, which states: "The Proposer shall, **within thirty (30) days of notification of award and prior to commencement of work, take out and maintain in full force and effect minimum insurance coverage** as specified in the attached requirements. This insurance shall remain in force and effect throughout the duration of the contract.

A certificate of existing insurance coverage should be submitted with the proposal as proof of insurability. **If the current coverage does not meet the RFP requirements, then the Proposer should request an affidavit of insurability** from the Proposer's insurance agent that certifies the requirements can and will be met. Failure to provide adequate insurance coverage may be cause for disqualification as non-responsive to the RFP requirements."

32. Which third-party integrations are currently operational, and which products listed in the RFP such as Formstack, Monday.com, Outlook, DocuSign and Airtable - are examples rather than existing integrations?

None of these integrations are currently operational. We use Ortoo to integrate emails from Outlook into email objects. We also have an integration with Rock Rabbit, Bellawatt, and Customer.IO.

33. What Salesforce program launches, migrations or major enhancements does SVCE anticipate during the first 12 months, and which items are currently considered the highest priority?

Maintenance tasks are highest priority. Timelines and details of new programs will be discussed after the contract agreement is signed with the selected consultant.

34. Approximately how many internal Salesforce users, administrators and program implementers use the platform? What are the anticipated annual and peak monthly volumes of external applicants, submitted applications, uploaded documents and web interactions?

Please see response to Q16. Also, monthly volumes of external applicants are typically 100-250 range.

35. For the program currently hosted in a partner utility's Salesforce organization, what level of organization and metadata access will be available to the selected consultant, who will be responsible for extracting source data and metadata, and what hard dependencies or target transition dates apply?

The entire structure of the program in the partner utility's Salesforce organization will be available to the selected consultant. The key is that the application cannot be shut down during the transition to SVCE's Salesforce environment as this is a critical program. Target transition date is by July 2027, but preferably sooner.

36. During onboarding, will SVCE provide architecture diagrams, data dictionaries, custom-object schema maps, integration documentation, managed-package guidance and an inventory of known technical debt or issues?

Yes.

37. Does SVCE currently hold licenses for Agentforce, Einstein AI or other relevant Salesforce AI capabilities? If not, should evaluation and licensing recommendations be included in the initial monthly support tier?

No, we do not hold licenses. We would require internal authorization to proceed with these AI capabilities. Proposers do not need to include evaluation and licensing recommendations in the monthly support tiers. Please also see response to Q38.

38. If an AI pilot is authorized, should Salesforce licensing, API and consumption charges be excluded from the consultant's professional-service fees and paid directly by SVCE?

SVCE would prefer that the selected consultant procures AI tools if authorized. Please scope this separately from the monthly support hours as an optional.

39. What project-management methodology and work-management tool does SVCE use to log, refine and track Salesforce requests?

Proposers should recommend a tool.

40. Who will serve as the primary product owner or decision-maker for Salesforce work? Which program, data, IT, security and vendor stakeholders will participate in backlog refinement, sprint reviews, user acceptance and release approval?
SVCE staff will serve as primary decision-makers. When appropriate, support from Brillion will be leveraged. In addition, SVCE's program implementers may participate in testing and approvals.
41. How frequently does SVCE expect backlog refinement, sprint planning, demonstrations and production deployments? What participation and response times should the consultant expect from SVCE stakeholders?
Backlog refinement, spring planning, etc. will be consultant-led. Participation from SVCE will be as needed. Expect response times of few days to 2 weeks, depending on time-sensitivity of tasks.
42. How will competing requests from different programs and departments be prioritized, and who has final authority to approve priorities, acceptance criteria and changes to the active sprint or monthly scope?
Proposers should recommend their approach to managing competing requests.
43. What KPIs will SVCE use to evaluate the engagement - for example, response time, deployment lead time, escaped defects, data-sync accuracy, program-launch timeliness, customer experience or administrator self-sufficiency?
Response time, accuracy, and customer experience, are all important KPIs. In addition, SVCE will also use proposed level of effort (LOE) and time estimates vs. actual LOE and time taken to evaluate consultant performance.
44. What is SVCE's current release and change-control process, including deployment windows, approval gates, rollback expectations and coordination with Brillion's managed-package release schedule?
We finalize all existing tickets and work in our UAT sandbox prior to deployment. We expect releases to be conducted overnight prior to the start of SVCE's workday business hours. We expect the selected consultant to be prepared and on-call for unexpected issues and to provide hot-fixes within the same business day.
45. What support hours, defect-severity definitions, target response and resolution times, and after-hours or emergency-support expectations should proposers use when developing service levels and pricing?
Please propose what you prefer and recommend. Document assumptions.
46. Who currently manages Salesforce backup, recovery and business-continuity planning? Are there required recovery point objectives (RPO) or recovery time objectives (RTO), and what backup, restore-testing or disaster-recovery responsibilities will apply to the selected consultant?

The selected consultant is expected to manage Salesforce backup, recovery, and business continuity planning, in coordination with SVCE staff and any relevant platform vendors. SVCE expects recovery activities to be performed with urgency and minimal disruption to program operations. Objectives will be established collaboratively with the selected consultant. We expect critical issues, data-loss events, and service disruptions to be documented with clear escalation paths.

47. The consultant should also advise on industry best practices for backup retention, restore validation, disaster recovery readiness, and ongoing risk mitigation to ensure the reliability and continuity of SVCE's Salesforce environment. Approximately how many SVCE staff members require administrator or end-user training, what are their current Salesforce skill levels, and does SVCE prefer live virtual workshops, recordings, written job aids, administrator office hours or a train-the-trainer model?

Please see response to Q16 for number of users. There are roughly 8-10 routine SVCE users and they have 6-18 months of experience using the current Salesforce systems. Please make assumptions and propose an appropriate model for training.

48. Must the prime proposer maintain its own current SOC 2 Type 2 report, or may the requirement be satisfied through a qualified subcontractor or service provider? At what stage must the report be provided - proposal submission, contract execution or before access to production data?

Please see responses to Q13, Q14, and Q15. As stated in the RFP section 17: "After vendor selection, SVCE will conduct a full security review of information security policies and practices along with SOC2 report."

49. What categories of customer, AMI, billing or payment data will the consultant access? Will masked or anonymized data be available in non-production environments, and does SVCE expect the consultant to store or process any PCI-regulated cardholder data?

Routinely access customer PII. Occasionally may access AMI. No billing or payment data. Yes, data may be masked or anonymized in non-production environments. No PCI-regulated cardholder data.

50. May the required \$5 million privacy and cybersecurity liability limit be satisfied through a combination of primary cyber coverage and excess or umbrella coverage?

51. Please confirm that the anticipated awardee-notification date should be September 25, 2026; the tentative timeline lists September 25, 2025.

Apologies for the typo. Correct awardee notification date is 9/25/26.

52. Please confirm that Exhibit D's Year 1 period should begin in October 2026; the exhibit currently references an expected October 2023 start.

Yes, correct. Exhibit D should begin October 2026.

53. The standard agreement refers to Scope, Schedule, Compensation, Insurance and Data Security as Exhibits A through E, while the attachments are labeled Exhibits B through F. **Apologies. The correct numbering for the exhibits is B-F.**
54. Please confirm the anticipated base contract term and renewal options. Although the engagement is described as month-to-month, Exhibit D requests rates for Years 1-5. **Expected contract term is ~18 months (October 2026 – March 2028).**