PowerForward Frequently Asked Questions:

Here is a list of commonly asked questions from potential applicants with regard to the two RFPs published on August 9, 2023. If there are outstanding questions not answered here, feel free to email us. While we are open to scheduling brief calls to answer questions, we encourage applicants to send us their questions via email first.

DEADLINE NOTE: We are extending the deadline for proposal submission to COB – 5pm PST on August 28th, 2023.

1) What metrics/KPIs need tracking quarterly? Preferred tools for usage metrics?
    a) Overall site traffic and any other associated site metrics. Our preferred tool is google analytics. Some other derived metrics (not site-based) which we expect to feature on the dashboard would include items like number applications approved, funded, $ of funding disbursed etc.
2) How is domain/hosting managed?
    a) We expect the vendor to host and manage the domain.
3) Website backend- WordPress or other?
    a) While Wordpress is our preferred choice given the ease of post-deployment customizations it allows, we are open to other alternatives proposed by the applicants and this is not an evaluation criteria as long as the functional requirements are met.
4) Integration needs with Salesforce and other systems?
    a) The website will have to be integrated with the CRM features (using Salesforce or similar) as seamlessly as possible. For this reason, we encourage applicants to review the website and CRM requirements in tandem prior to submitting their proposals.
5) User actions on the website?
    a) We expect normal user interactions like navigating between pages, sections, interacting with the dashboard. However, please note that the website needs to be integrated to the CRM blocks and allow logins to applicant portals which then enables various actions as expected in the RFP. Please refer to the reference websites listed on the RFPs for references (HVIP and Communities in Charge).
6) Purpose/contents of applications?
    a) We expect the website to be a platform of information dissemination and be the front end of the Powerforward program and allow administrators and applicants access to the (thought unique log-in portals) to the back-end CRM.
7) What tools/graphics on the site?
    a) Please refer to the references provided in the RFPs.
8) Is there an SOW for the RFPs?

    a) Yes. Based on the objectives in the RFP, CALSTART will develop a full-blown SOW with the successful candidate(s) and include it as part of the contract.

9) Overall project objectives?

    a) To develop a website with CRM integration wherein, the website shall act as a front-end for dissemination of all Program critical news, information and critical updates including a dashboard. Interested applicants shall register their interest to submit a full application through the website. Each applicant shall have access to their application portal (by means of log-in credentials) to submit their application package. CALSTART administrators shall have access to the CRM (back-end) wherein, they are able to access each application package for review. All successful applicants shall continue to have access to their application portals for further tracking, report submissions, invoicing etc. CALSTART values the privacy and security of each applicant, and it is essential that the website and CRM operate and is maintained to retain that integrity. At this time, we expect less than 20 applicants for the duration of the entire program. The RFPs shall detail the objectives of each and please review the reference models provided within. A more detailed SOW will be developed by CALSTART and agreed upon once a successful candidate(s) is selected.

10) Sales/marketing process details?

    a) We do not have any sales/marketing targets.

11) CRM users and contacts count?

    a) We expect less than 20 applicants for the grant and a maximum of 10 CALSTART administrators.

12) Integration with other tools or campaigns?

    a) We do not anticipate any integration other than the CRM integration as already mentioned in the RFP. Please note that we may have periodic (every 1-2 months) news updates on the program we would want the website to display.

13) Sales targets tracking method?

    a) We will not have any sales tracking. We will have grant $ approved for each applicant and then disbursed based on payment schedules which the CRM shall track, record and shall be used by the website dashboard for reporting.

14) CRM needs, usage and lead qualification?

    a) The RFP details the high level goals for the CRM – at its core, it needs to serve as a portal for application submission, tracking of application status, post-approval tracking of funds disbursed for each applicant, applicant invoice tracking, submission of reports.

15) Sub-grant availability advertising method?

    a) We would not be actively updating fund availability. However, a public solicitation will take place by means of emails blasts, workshops, other outreach, and information pertaining to these will need to be made available on the website.

16) Application form submission process?

    a) We expect to use CRM-based application submission portals. Each applicant shall have a unique log-in (we do not expect more than 20 applicants) through which they can make their submissions per the solicitation requirements. The application package could be a combination of Word documents, PDFs, Excel sheets, PowerPoints etc. (<10MB). The SOW will detail the CRM flow and modules once a candidate is identified.

17) Data in sub-grant reports?

    a) We expect sub-grant awardees to submit quarterly reports in the form of PDFs, Excel sheets, PowerPoints to detail and track progress of their work.

18) Application and payment status tracking?

    a) We expect the CRM interface to cater to the needs of application and invoice tracking as detailed in the RFP.

19) Multi-language support and accessibility?

    a) ADA compliance maintenance and accessibility is mandatory. We would like for applicants to list the cost associated to enable multi-lingual – Spanish and English.

20) Applicant-administrator interaction?

    a) The interaction requirements are similar to that of any other CRM-based application portal where we expect the applicant to be able to track their submission with a “status” which CALSTART administrators would command. CALSTART administrators shall have rights to reject applications in cases where resubmissions are warranted. Applicants can submit additional documents post-submission. Every status change, submission shall prompt a notification to the respective applicant and CALSTART.

21) Required features for applicants in the CRM?

    a) Please use the objectives for the CRM (and website) in the RFP for proposing the modules and build. Please refer to the reference HVIP website for a similar model. A detailed SOW shall be worked on once a final candidate is identified.

22) What can we expect after proposal submission?

    a) CALSTART will acknowledge receipt of proposal within 24-48hrs after receiving it. A reviewer shall reach out or schedule meetings if there are questions and topics that need to be addressed. Once a candidate is identified, an SOW and a contract shall be reviewed and shared for execution. We expect contract execution within a month after identifying a candidate and the work items to commence immediately after execution.