



Date:	06 June 2026
From:	Procurement
To:	Bidders
Regarding:	Question/Answers 2026-037

- 1. Which Salesforce editions/licenses are currently active? (Sales Cloud, Service Cloud, Nonprofit Cloud, or standard NPSP on Enterprise Edition?) This directly impacts which capabilities are available natively versus what may require custom development.**

LRC currently uses Salesforce as a SaaS platform with fundraising and hotline-related functionality. LRC has Marketing Cloud Engagement – Corporate Edition with Industries Integration and Nonprofit Add-on, in addition to Service Cloud Enterprise Edition.

- 2. How many Salesforce users are currently active, and how many additional users are anticipated for the 1760 hotline team?**

The current number of active users and the expected additional 1760 hotline users have no impact on the bid. However, this information will be confirmed during the assessment phase. The proposed solution must support scalability for future expansion and emergency surge capacity.

- 3. Are there any AppExchange managed packages currently installed beyond NPSP and iRaiser? (e.g., Conga, DocuSign, FormAssembly, Accounting Subledger, etc.)**

NPSP and iRaiser are part of the current environment. iRaiser is integrated through REST API. Any additional details will be reviewed during the technical discovery phase.

- 4. What is the current integration mechanism with iRaiser? Is it based on direct APIs, middleware (MuleSoft, Zapier, custom ETL), or a managed package connector? This is important as the RFP mentions remediation requirements but does not describe the existing integration architecture.**

The current iRaiser integration setup is integrated through REST API. However it will need to be assessed by the selected bidder. The scope includes reviewing the existing integration and proposing remediation where required.

- 5. What specific data overwrite, synchronization, or duplication issues are currently occurring with iRaiser?**

The main issues relate to donor data synchronization, duplicate records, data consistency, and potential overwrite risks between iRaiser and Salesforce and this should be evaluated and mitigated by the selected bidder



6. **What is the frequency and transaction volume of iRaiser integrations? Is the integration real-time, scheduled batch-based, or event-driven? Approximately how many donations are processed per month?**

Transaction volume varies depending on campaigns and emergencies. Exact historical figures will be shared during discovery. Bidders should propose a solution that supports current operations and future growth. The existing integration method and synchronization frequency should be reviewed and documented by the selected bidder as part of the assignment. Currently, the applied approach is event-triggered.

Donation volume varies depending on campaigns, appeals, and emergency response activities. Exact historical figures will be shared during discovery. The proposed solution must be scalable and able to support future growth.

7. **Has inGenius already been partially configured, or is this a completely fresh installation with no Salesforce connectivity to date?**

The integration with Salesforce is part of this scope. The bidder should assess the current telephony/CTI setup and propose the required configuration and integration approach. Bidders may refer to inGenius requirements and documentation through the official Upland inGenius website.

8. **How many hotline agents are expected to use the CTI-integrated Salesforce environment simultaneously during peak hours?**

The solution should support multiple concurrent 1760 hotline agents and supervisors, including peak-hour and emergency surge scenarios. Exact figures will be confirmed during discovery.

9. **Will call recordings need to be stored or linked within Salesforce, or will they continue to be managed separately within the telephony platform? Additionally, are there any other communication records that must be retained within Salesforce?**

Call recordings are expected to remain stored in the telephony platform, with secure links and metadata accessible from Salesforce where applicable. Salesforce should retain relevant communication records, including calls, cases, follow-ups, referrals, status updates, notes, and case closure details.

10. **What languages does the hotline currently support? Will Salesforce UI, guided scripts, and forms need to support Arabic in addition to English?**

The hotline operates mainly in Arabic and English, and Salesforce forms, scripts, and user-facing workflows should support both Arabic and English where required.



- 11. What does the current escalation matrix look like? Which departments receive which case types, and what are the SLA thresholds for each escalation category?**
The current escalation matrix and SLA thresholds will be finalized during the business analysis phase. The bidder is expected to document, optimize, and configure the agreed workflows.
- 12. The RFP mentions donor self-service capabilities “where already envisioned.” Could LRC clarify whether an Experience Cloud portal is already in scope, planned for a later phase, or simply a future consideration? This has a significant impact on licensing and implementation effort.**
Experience Cloud is not confirmed as part of the mandatory scope. It should be treated as a future consideration or optional enhancement unless explicitly requested in the final proposal.
- 13. What is the approximate volume of existing donor records currently stored in the system? This will help assess deduplication, remediation, migration, and testing efforts.**
The existing donor database includes historical donor records from multiple channels. Exact volumes will be shared during discovery. Bidders should account for deduplication, data quality review, and testing.
- 14. Are there any cases involving sensitive or restricted data (e.g., staff complaints, child protection matters, medical referrals, etc.) that require enhanced field-level security, restricted visibility, or additional compliance controls beyond standard role-based access?**
Yes. Some hotline cases may include sensitive or restricted information, including complaints, beneficiary data, medical referrals, protection-related concerns, and internal operational records. The solution must support role-based access, record-level security, field-level security, audit logs, and data protection compliance.



Question ID	RFP Section Reference	Requirement Area	Clarification Question	LRC Response
Q01	Section 3.2.1	Existing Fundraising Platform	Please confirm whether the current fundraising implementation is based on Salesforce Nonprofit Cloud, NPSP, or a custom Salesforce implementation.	LRC currently uses Salesforce as a SaaS platform with fundraising and hotline-related functionality. The environment includes Marketing Cloud Engagement – Corporate Edition with Industries Integration and Nonprofit Add-on, in addition to Service Cloud Enterprise Edition. The detailed configuration should be validated during discovery.
Q02	Section 3.2.1	Existing Fundraising Platform	Please confirm whether the current fundraising implementation contains custom objects, custom automations, or third-party managed packages beyond iRaiser.	NPSP and iRaiser are part of the current environment. iRaiser is integrated through REST API. Custom objects, automations, and any additional managed packages should be reviewed and documented during the technical discovery phase.
Q03	Section 3.2.2	Donor Data Model	Please confirm whether donor records currently include Individual, Corporate, Institutional, and Group donor classifications, or whether additional donor classifications are expected.	The solution should support Individual, Corporate, Institutional, and Group donors. Any additional donor classifications required by LRC should be identified and finalized during the business analysis phase.
Q04	Section 3.2.2	Historical Data	Please confirm whether all existing donor, donation, and campaign history must be preserved without structural modification during remediation activities.	Yes. Existing donor, donation, and campaign history must be preserved. Any remediation or structural changes must be validated, backed up, mapped, and approved by LRC before implementation.
Q05	Section 3.2.3	Donor Lifecycle Management	Please confirm whether donor lifecycle stages are already defined by LRC or expected to be designed as part of this engagement.	Some operational donor stages may already exist; however, the selected bidder is expected to review, optimize, and formalize the donor lifecycle as part of the engagement.



Q06	Section 3.2.3 & Annex B	Donor Self-Service	Please clarify the expected donor self-service capabilities referenced in the ToR, including profile updates, communication preferences, recurring donation management, or donation history access.	Donor self-service is not confirmed as part of the mandatory scope. It should be treated as a future consideration or optional enhancement, unless explicitly requested in the final agreed scope.
Q07	Section 3.2.4	Reporting & Analytics	Please confirm whether the dashboards listed within the ToR represent the complete reporting scope or whether additional executive and operational dashboards are expected.	The dashboards mentioned in the ToR represent the minimum expected scope. Additional executive and operational dashboards may be confirmed during discovery and should be configurable where possible.
Q08	Section 3.2.2	Donation Channels	Please confirm all donation channels currently integrated with Salesforce (e.g., Website, iRaiser, Events, Branches, Cash Donations, Bank Transfers, SMS Donations).	iRaiser is the confirmed fundraising integration. Other channels such as website, campaigns, events, branches, cash, bank transfers, or SMS donations should be assessed during discovery and included only where confirmed by LRC as separated job
Q09	Section 3.2.2	iRaiser Integration	Please confirm whether the existing iRaiser integration is expected to remain functionally unchanged apart from remediation and optimization activities.	The existing iRaiser integration is expected to remain in place. The scope is to assess, remediate, optimize, and document it, unless a replacement approach is technically justified and separately approved by LRC.
Q10	Section 3.2.2	iRaiser Integration	Please provide details of the current iRaiser integration failure scenarios, synchronization issues, or transaction errors currently observed within the existing Salesforce environment.	The main observed issues relate to donor data synchronization, duplicate records, data consistency, and potential overwrite risks between iRaiser and Salesforce. Detailed logs and examples will be reviewed during discovery.



Q11	Section 3.2.2	External Integrations	Please confirm whether any fundraising platforms, payment gateways, or external systems other than iRaiser are currently integrated with Salesforce or expected to be included in this engagement.	No additional mandatory fundraising platform or payment gateway integration is confirmed beyond iRaiser at this stage. Any additional integration should be treated as optional or future scope unless approved by LRC.
Q12	Section 3.3.1	Hotline Caller Management	Please provide the expected caller profile information to be captured and maintained within Salesforce for hotline operations.	Caller profiles should include, at minimum, caller name, phone number, alternative contact, location, related cases, interaction history, consent/communication preference, referrals, notes, and sensitivity flags where applicable.
Q13	Section 3.3.2 & Annex A	Hotline Case Categorization	Please provide the expected case categories, subcategories, and business classifications to be supported within the 1760 hotline solution.	Case categories should cover requests, inquiries, complaints/feedback, referrals, service information, beneficiary assistance, fundraising/donor inquiries, and sector-related cases. The final taxonomy will be agreed during business analysis.
Q14	Section 3.3.3	Case Routing	Please confirm whether case routing is expected to be based on departments, business units, geographic regions, or a combination of these factors.	Case routing should be based on a combination of case type/category, responsible department or sector, geographic location, urgency, sensitivity, and escalation rules.
Q15	Section 3.3.3	Escalation Rules	Please provide the expected SLA timelines and escalation matrix applicable to hotline cases.	The detailed SLA timelines and escalation matrix will be finalized during business analysis. The bidder is expected to document, optimize, and configure the agreed SLA and escalation workflows.
Q16	Section 3.3.5	Hotline Operations	Please provide approximate daily and monthly call volumes expected for the 1760 hotline.	Call volumes vary depending on normal operations, campaigns, and emergency periods, however in normal operation it varies between 200 to 300 per day The solution must be scalable for peak and surge operations.
Q17	Section 3.3.5	Hotline Operations	Please confirm whether the hotline operates during business hours,	The solution should support standard business operations, shift-based work, and



			multiple shifts, or 24x7 operations.	extended or surge operations during emergencies when required.
Q18	Section 3.4.1	CTI Integration	Please confirm that the existing Cisco telephony environment and inGenius licenses are already available and operational.	LRC has an existing telephony environment (Cisco call manger, and inGenius server and license is already exist). Salesforce integration with inGenius is part of the project scope.
Q19	Section 3.4.2	CTI Functionality	Please confirm whether call recording functionality is expected to be surfaced and accessible through Salesforce.	Call recordings is not part of this integration
Q20	Section 3.4.2	CTI Functionality	Please clarify whether supervisor monitoring includes call listening, whisper coaching, call barging, or reporting-only capabilities.	Supervisor monitoring requirements will be finalized during discovery. At minimum, reporting and supervisor visibility are expected. Any listen, whisper, or barge capabilities depend on the telephony/CTI platform and should be clearly specified by the bidder.
Q21	Section 3.4.2 & Annex A	Screen Pop	Please confirm the information expected to be displayed during inbound call screen-pop events (Caller Details, Donation History, Cases, Donor Information, etc.).	Screen pop should display relevant caller details, matched donor/contact information, donation history where applicable, open and previous cases, location, sensitivity/priority indicators, and quick actions for logging or case creation.
Q22	Section 5.1	Security Model	Please confirm whether hotline and fundraising users require separate security models and data visibility restrictions.	Yes. Hotline and fundraising users require separate security models and data visibility restrictions. Sensitive cases must support role-based access, record-level security, field-level security, and audit logging.
Q23	Section 5.2	Compliance	Please confirm whether any regulatory requirements in addition to GDPR should be considered as part of the implementation.	In addition to GDPR, the implementation must comply with LRC data protection requirements, confidentiality and applicable Lebanese legal requirements where relevant.
Q24	Section 5.6	Language Support	Please confirm whether Salesforce user interfaces, reports, dashboards, email templates, and	Yes. Arabic and English support is required where applicable, including forms, guided scripts, templates, reports, dashboards



			communications are required in both English and Arabic.	
Q25	Section 5.5	Data Migration & Cleansing	Please confirm whether historical data cleansing, deduplication, and data quality remediation are expected as part of this engagement.	Yes. Historical data quality review, deduplication, and remediation are expected as part of the engagement. No destructive changes may be performed without LRC validation and approval.
Q26	Section 3 – Scope of Work	Integration Boundary	Please confirm whether integrations other than iRaiser, Cisco Telephony, and inGenius are expected as part of the project scope.	No mandatory integrations are confirmed beyond iRaiser, Cisco telephony, and inGenius. Any other integration should be considered optional or future scope unless explicitly approved by LRC.