Procurement and Contracting Services

Request for Proposals for College of Veterinary Medicine Customer Relationship Management Software

ADDENDUM #1

Please mark all proposal submission Envelopes with the following information

Sealed RFP # L182108
Due on June 4, 2021 no later than 2:00 PM, MST
The purpose of this addendum is to extend the current due date of the RFP from May 20, 2021 to the new due date of June 4, 2021 by no later than 2:00 PM, MST.

The following questions have been received by the technical question due date of May 11, 2021 by 12:00 PM, MST.

1. What is the number of users you foresee using the platform?
   a. We expect to have 8 users.

2. I see that you process about 3,000 applicants per season, how many people do you have managing/working those prospects?
   a. We have 4 people managing/working these prospects.

3. Would you be open to a custom build or out of the box?
   a. We are open to an Out of the box build.

4. Are you open to a solution on a secured cloud platform such as Salesforce?
   a. Yes.

5. For Pricing – Do you have any preferred format for submitting the pricing as part of the proposal?
   a. Vendors are to submit pricing in a format that encompasses the requested items in section 5.16, it can be in a quote format, or detailed list format as long as it includes all requested details and information.

6. When do you plan to start this project?

7. Regarding Section 3.9.5: Determination of and Information Concerning Vendor's Qualifications, could you please confirm that this opportunity allows the use mixed pool of IT talent located outside the United States (i.e. India) along with US based consultants?
   a. The University will review all vendor submissions, the determination will be made upon review of submissions.

8. Do you also require Student portal for Students to login and access/update their data? Also, please provide the number of students that will be logging into the portal?
   a. No. 500+ per year

9. There is reference of 3rd Party integration such as Peoplesoft Campus Solution. What other 3rd party integrations do you require with the proposed system? Please also advise whether it will be bidirectional or unidirectional.
   a. As of now just Peoplesoft to integrate into UAccess. Bidirectional.

10. There is no reference of existing data migration to the proposed software. Do you require Data Migration? If yes, how much approximate size (number of records) of data to migrate?
We will review data migration as proposed and we would prefer for this to be a separate line item in the bids. We are looking for a system that we will be able to import data from on our own, so if you can export from your current system it can probably be done in house.

11. We understand that cloud platform support is required. Are you also looking for Support on the functionalities developed as part of implementation? Can you please suggest what level of support you require such as 24*7 or 24*5 or 8*5? Any specific business hours and suggest the time zone you are looking for the support?
   a. The first part of the question sounds like support for customizations that they've built which is probably necessary. For those types of items and others business hours should be fine. I would think that for some items, such as emergencies, a 24/7 approach would be appropriate.

12. Will references which represent the requested services, solution, and are similar in size and scope to the statement of work contained within this request be eligible for consideration as relevant references in scoring responses, when they are not also from a higher education institution specifically?
   a. All references will be looked at per the guidelines in section 5.22. Experience in higher education institutions will also be reviewed as applicable.

13. Regarding section 5.5.4, is the prospect user experience responsive/dynamic to their specific population? (Veterans, transfers, etc.) Can you please elaborate?
   a. No.

14. Regarding section 5.7.2 does your system allow for tracking of electronic communications? Are you referring to history of communication?
   a. Yes.

15. Regarding section 5.11.7 are there any time limits to record retention? Can you please elaborate as to which records?
   a. Any records. If there are differing time frames for different types of records than limits for each should be listed.

16. Regarding section 5.20.5 if you are designing digital content such as email, Web-based or Social Media content, discuss your efforts to ensure accessibility. Can you please elaborate?
   a. We are requesting information be provided that would detail the accessibility efforts of the vendors based on a variety of platforms, and what will be done to ensure accessibility. For example, have content templates been checked for compatibility with screen readers.

17. Within what budget range are you working for this project specifically?
   a. No budget will be disclosed for this project.

18. How are you weighting price, amongst other categories of the proposed solution?
   a. Weights are not provided; Evaluation Criteria is in descending order of importance.

19. What is the anticipated timeline for implementation after acceptance?
20. We operate with public and private higher education institutions of all sizes. If a proposal provides examples of previous work with private institutions, of similar size and scope, would this suffice?
   a. Vendor submissions will be reviewed on completeness of submission, submissions should include information requested, additional information can be submitted as desired by vendor submitting.

21. Do you expect the implementation estimate to encompass all of the requirements listed in the RFP? If no, which requirements would be top priorities for the requirements?
   a. Submissions should be based on requirements and information requested in the RFP.

22. How many users and from which departments/roles from the University of Arizona will be interacting with the solution? (ex: IT, Admissions, Recruitment, etc.)
   a. 8. IT, Admissions & Recruitment, Financial Aid.

23. How would you describe your project team’s technical capabilities? Which identified users that would take on the role of System Administrator after the implementation?
   a. In process. For now, Katie Beringson, Director of Admissions and Student Affairs.

24. What, if any, compelling events, deadlines or milestones are driving the evaluation or proposed project timeline?
   a. This RFP is posted as it is an initiative important to the University.

25. Where does this initiative sit in terms of priority relative to other projects at the University?
   a. This RFP is posted as it is an initiative important to the University.

26. Has this initiative already acquired executive budget approval?
   a. Yes

27. What staffing resources from the University would be available to this implementation? Please list roles and expected capacity.
   a. The Enrollment Management Systems and Communication (EMSC) team will provide full service implementation support for the College of Veterinary Medicine’s CRM including: designing database architecture, creating project timeline and specifications, building out database fields and prompts, populating database with any historic data, integrating with 3rd party systems, providing training to College of Veterinary Medicine staff, creating other essential database components and services outlined below. After an initial implementation, EMSC will continue to support the College of Veterinary Medicine’s Slate CRM for 20 hours a week as defined by the College of Veterinary Medicine’s needs and as a part of the larger institutional IT ecosystem. CVM will be hiring a Systems Operations Specialist Senior for implantation and long-term support.

28. Is the University open to a phased approach for implementing these requirements based on recommendation from your selected partner? Or, are all requirements a must have for phase 1 of the implementation?
   a. We are open to a phased approach, but it will depend on the actual proposal of the approach and what type of timeframe doing it in phases leads to.

29. What are the most important qualities you are seeking in a vendor?
a. Please refer to the evaluation criteria.

30. Regarding section 5.3.1 Can you provide more information around this requirement? What data points will be captured related to standardized testing? What functionality is required?
   a. This may or may not include test scores, this question is generically about importing data from external sources. We want to know which sources the vendor already has configured. Additionally, if the vendor keeps these methods up to date as the source changes that would be good to know. The vendor should assume that we want the capability to extract any and all data provided by the source.

31. Regarding section 5.4.5 Can you provide more detail or an example of what a task list would look like?
   a. We are looking to see if this is a function that exists in the vendor product, we are looking for them to describe what it is, if it exists or not and what it may look like. As this may vary among products, we do not have an example of a task list or to do items.

32. Regarding section 5.5.2 Do you have more specific requirements around what pre-application functionality should exist for the prospects and applicants?
   a. This could vary among vendors and what they have regarding this functionality but it could be things like being able to send email campaigns, having RFI forms available, scheduling and tracking attendance of events, call jobs, etc. Primarily this question is looking for differentiation on how prospects and applicants are treated and what features are predicated on having a complete application.

33. Regarding section 5.13 Training - Is CVM interested in end user training or a train-the-trainer approach to training?
   a. Train the trainer.

34. Are you currently using a middleware platform/ETL tool to integrate data?
   a. EMP currently.

35. Is there already an integration architecture in place? (point to point or API led)
   a. EMP currently.

36. Do you run event based or batch scheduled integrations?
   a. Yes.

37. Which integration sources are considered a must have within this project? (i.e. PeopleSoft)
   a. Peoplesoft.

38. Please confirm data types within all required systems (i.e. course data, financial data)
   a. Financial data, personal data.

39. Do you have an internal resource who will be performing integration development on this project or are you looking for your selected vendor to fully complete the integration?
a. Internal, assuming that their integration tools are customizable on the user end.

40. Will a load of historical data be required from your selected implementation partner? If so, which sources will require the transfer of data?
   a. Yes, from WebAdmit.

41. Does PeopleSoft contain all core academic data including registration, course cancellations, and grades that advisors can consume?
   a. Yes.

42. Which version of PeopleSoft are you using?
   a. We are currently on version 9.2 of PeopleSoft.

43. Have you selected an authentication provider for Single Sign On?
   a. We have not selected a new provider for SSO yet. We are currently using open source tools for SSO functionality.

44. What does the University currently use for marketing and mass mail sends to students? Should your selected partner consider the implications this solution will have for mass email to students?
   a. EMP for applicants and prospects only. Webadmit for applied applicants.

45. Will your admissions/committees/application decision makers have a system license, or will they do their review/decision outside of the system?
   a. Will review within Webadmit.

46. Do you plan to integrate with the Common Application systems in this project or a future project? If yes, please list which application systems (e.g. Common App, SOPHAS, etc.)
   a. VMCAS.

47. Do all of your programs follow a single academic calendar? If no, how many academic calendars do you have?
   a. No, 3. One for each entering class.

48. If available, please list your current applicant lifecycle stages from prospect to enrollment stage. (These may be current Status and/or Substatus field values)
   a. Not available

49. Do you ever enter leads into your database that may not have explicitly requested information about your school or its programs (i.e. list purchases, names from test sites, etc.)? If yes, what does that volume look like (i.e. hundreds of names or thousands)?
   a. No.

50. How many application types are needed? Please list out each application type (e.g. Undergraduate, Transfer, Graduate, Post-Bacc, Continuing Ed, Other)
   a. Graduate.
51. How many admission deadlines do you have per year?
   a. One.

52. If you are rolling admissions, are your applicants still given deadlines?
   a. Yes. September 15th of every year.

53. Please describe how your prospects and applications are assigned/owned in the system?
   a. All applicants apply through WebAdmit. From there, the applications will be maintained in this CRM system.

54. Do your applicant reviewers need document markup capabilities?
   a. No.

55. Can you describe how your applications are routed for decisions? Do you use committees, or are decisions made by single individuals?
   a. Admissions Committee.

56. Do you allow multiple applications per admit period?
   a. No.

57. Do you need to communicate with a parent about their child’s application?
   a. No.

58. Please describe how you communicate application status to an applicant? For this purpose, do you send emails manually, or automated? What details about the individual’s application do you include in the body of this email?
   a. Applicants are sent emails through WebAdmit manually.

59. How does an applicant accept or decline their admission? Is there a formal process and financial deposit?
   a. There is no deposit to accept their admission. They accept currently through a separate process (google classroom). Our goal is for them to accept through this CRM system.

60. Are there any petition processes that occur during the application process?
   a. No.

61. Describe the supplemental materials required for your application - are you managing a lot of paper documents, and do you envision those moving to electronic documents?
   a. All supplemental materials are done online.

62. Is there any supplemental exam process required as part of your application process?
   a. There is a video assessment that is done by Kira Talent.

63. Do you allow deferrals, and if so, how do you currently manage deferrals?
64. Do you give experiential credit? If yes, please describe relevant processes.
   a. No.

65. Do you need any specific access or reporting created to support their external transfer partners and their programming success (i.e. Pima Community College)?
   a. No.

66. Do you track legacy information (i.e. relationship to alumni)?
   a. Not right now but we will in the future.

67. Do you recruit athletes, and if so, how do you identify athletes in your current system? Do you use an external database for athlete management?
   a. No.

68. Do you require letters of recommendation, and if so, how are they currently acquired?
   a. Yes, 3. They are submitted with their original application through WebAdmit.

69. Do you prefer sending paper or electronic decision letters?
   a. Both.

70. When do you officially consider an applicant “enrolled” and counting toward your headcount?
   a. July 30th.

71. Do you need to manage recruiting and admissions events in the application?
   a. Yes.

72. Can you describe the types of events you would like the application to track? (i.e. Open Houses, Tours, 1:1 meetings, etc.) Are these ticketed events, virtual or face to face?
   a. All events will need to be tracked as well as recruitment events. All face to face.

73. What email automation/marketing platform are you currently using? When does your license expire?

74. What CRM system is University of Arizona CVM currently using?
   a. EMP.

75. Will some users only need limited functionality? If so, how many of these types of users will there be and what types of tasks will they need to accomplish? Some examples would be faculty members who strictly review applications for admission, student workers who strictly use the system to enter inquiries or make phone calls, etc.
   a. Admissions committee will need limited access. Everyone else, all access.
76. Are there any users who will strictly be reviewing applications? If so, how many of these will there be?
   a. 12.

77. How many users will be involved in application review using the new system?
   a. 12.

78. Do you plan to use the new system for managing events? If so, how many users will be involved in creating events and event registration pages with the new CRM system?
   a. Yes, we will use it for managing events. 3 users.

79. Does CVM want the new system to provide a portal experience for applicants to upload documents, check their status, receive communication from the University etc?
   a. Yes.

80. Outside of an applicant portal, are there any other types of portals CVM would be interested in? Some examples could include a parent portal, international agent portal, etc.
   a. No.

81. Do you want the chosen vendor to perform integration with PeopleSoft or will the University take care of that internally?
   a. It will be a combination of integration with Peoplesoft and work with the staff at the University to achieve this.

82. Does CVM currently have a text messaging solution? If so, do you want to continue using that solution or do you want a new text messaging tool with the new CRM?
   Yes.

83. Regarding a text messaging solution, how many total texts does CVM send annually? How many phone numbers would you want supported for the text solution (how many phone numbers would you want these texts to be coming from)?

84. Approximately how many unique email addresses (contacts) does CVM include in email marketing campaigns annually? We are mainly looking for the total number of individual email.

End of addendum, all else remains the same.