

 **RFP NO: RFP20-022 DATE: AUGUST 2, 2019**

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**ADDENDUM #1**

FUNDING DEPARTMENT: SOFTWARE MAINTENANCE AGREEMENT

EQUIPMENT/SERVICES REQUESTED: CUSTOMER RELATIONSHIP MANAGEMENT HOSTED SOFTWARE

**PLEASE NOTE: SEE BELOW FOR CLARIFICATIONS AND ADDITIONAL INFORMATION: PLEASE SUBMIT THIS INITIALED ADDENDUM WITH YOUR BID RESPONSE.**

1. Do you plan on implementing additional departments in to the CRM such as Finance, Financial Aid, etc.?

**Other departments would have access to the CRM, but it would mostly be read-only. The scale will depend on the functionality of the CRM and add-on services (for example, student portal, retentional portal).**

1. What is the user count for this implementation for internal university employees?

**We currently have about 130 staff, faculty, and student employees who have access to the CRM, but most of them have only read-only access. There are about 10 full-use users and 20-30 additional active users (somewhere in between full use and read-only).**

1. For the student portal, what is the volume of logins for the portal? How many licenses would be needed? How often would a student log in? How long would they retain access after graduating, withdrawing, transferring, etc? What information would be exposed within the student portal?

**MWSU doesn't currently have a student portal, so we are unable to answer these questions. We do currently have 4,155 full-time equivalent students. We are mainly interested in knowing what the vendor product can provide -- we are looking for opportunities.**

1. What is the previous CRM? Will a data migration be required as part of the effort? If so, what is the volume of data (Count of tables, size of data (MB,GB)?

**We currently use Campus Management's Connect CRM (formerly Hobsons). A data migration will likely be required -- the vendor should outline their capabilities. I do not know the volume of data. There are currently 130,000 contact records in the CRM.**

1. IT/System Requirements: Item K: What integration options are currently available for the Banner system? Do you currently have a data broker such as Informatica, Mulesoft, Cast Iron?

**We do not use a data broker.**

1. IT/System Requirements: Item K: What level of data integration do you require between Banner and CRM? For example, do you require nightly sync-ups or real-time integration?

**We would need a minimum of one nightly sync of information between Banner and the CRM. The frequency needed may depend on the functionality of the CRM and add-on services (for example, if there is a retention portal, we would likely need real-time integration). The vendor should outline their capabilities.**

1. IT/System Requirements: Item N: Is SSO with Luminis Portal an absolute requirement?

**Response from IT: SSO is not tied to Luminus; however, we would desire an SSO solution. For SSO integration, we support CAS, SAML, and Shibboleth protocols.**

1. CRM Requirements: Item G: What is this predictive modeling intended to predict, i.e., what is the rating a measure of? Is this academic performance, likelihood to gradaute on time, etc? What data points go into the rating?

**The predictive modeling is intended to predict a propsective student's likelihood of enrolling. Data points could include things such as GPA, ACT score, financial need, etc. If the vendor provides this service, the vendor should outline the data points that go into their rating system (or be prepared to discuss during the demo).**

1. CRM Requirements: Item J: Can you be more specific about the type of student collaboration you want the CRM to support? For example, does this mean collaboration on class projects, homework, and other academic activities, or is it for social events, service projects, student affairs, or all of the above?

**The vendor should outline any add-on services they provide related to a student portal. We are looking for something geared more toward social activities, but we are interested in knowing what options the vendor provides.**

1. CRM Requirements: Item K: What sort of student data will be stored in the CRM? Will it just be contact information, or also courses, grades, class schedule, degree program, major, etc.?

**It depends on the functionality of the CRM and any add-on services the vendor provides. At the most basic level, it will be contact information and information related to the inquiry, applicant, and enrollment life cycle.**

1. How many applications does the school receive annually?

**8,000 applications per year.**

1. Do you have centralized admissions or would you prefer/need a separate environment for Undergraduate and Graduate stakeholders?

**MWSU doesn’t need a separate environment for undergraduate and graduate stakeholders. We do not have centralized admissions for the graduate level; however, we are involved in the graduate application process. At this time, the Graduate School is transitioning to GradCAS and will be using that to manage applicant communications. However, the CRM will still be used to manage communication flow to graduate inquiries.**

1. How many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher level functions) do you anticipate will access the solution?

**We don't have an exact count on this, but we would anticipate there would be approximately 10 full access users.**

1. How many limited access users (only able to update contact data fields, add notes, and run pre-written reports) do you anticipate will access the solution?

**There are currently 129 people who currently have access to the CRM, though the majority of them are in there only so they can receive exports. Of the 129, only about 20-30 are active users.**

1. Do you expect to use the chat feature? If so, how many chat users do you anticipate will access the solution?

 **Yes, we are interested in the chat feature. If implemented, I would expect about 10 people in Admissions would need to be able to access the feature.**

1. How many full-time equivalent (FTE) students does your institution have currently or on average?

**We currently have 4,155 FTE students.**

THIS ADDENDUM IS HEREBY CONSIDERED TO BE A PART OF THE ORIGINAL BID SPECIFICATIONS AND NEEDS TO BE INITIALED AND RETURNED WITH YOUR BID IN ORDER TO BE CONSIDERED.