

March 22, 2019

RFP 40633

ADDENDUM 1

ITEM: Enterprise-wide Customer Relationship Management (CRM) System

DEPARTMENT: Kansas State University – Office of the CIO

CLOSING DATE: April 5, 2019 at 2 p.m.

CONDITIONS OF ADDENDUM:

The following are attached for review and consideration:

- Responses to vendor questions

Please send a signed copy of this addendum with your bid response.

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I (we) have read and understand this Addendum and agree it is a part of my (our) bid on the above proposal.

NAME OF COMPANY OR FIRM: _____

SIGNED BY: _____

TITLE: _____ DATE: _____

RFP 40633 - Enterprise-wide Customer Relationship Management (CRM) System

Vendor questions received by 5:00 pm 03/08/2019 prior to pre-proposal meeting on 3/13/2019.

- Q1. What is driving August 1, 2019 go-live timeline?
A1. Our undergraduate recruiting cycle for Fall 2020 begins. It is our desire to handle all recruiting functions for this class in our new CRM.
- Q2. What are the critical requirements for phase 1 to implement by August 1, 2019?
A2.
- Convert undergraduate Fall 2020 prospects from the current system
 - Integration with our PeopleSoft system
 - Integration with our video wall
 - Send campaigns to targeted pool of undergraduate prospective students
 - Students to complete an online registration form
 - Have internal knowledge for us to create our own data imports and extractions but provide assistance along with training for initial integrations.
 - Interface with common application
 - Training for all phase 1 impacted staff held prior to August 1, 2019
 - Ability to schedule, plan, manage, and track campus visits.
- Q3. The first page of the RFP notice states the date of award being June, 2020; however, the intent to award date in the timeline shows May 15th, 2019. Can you please clarify?
A3. We start on May 15 and we would like the contract to go through June 30, 2020 to align with our fiscal year. We could do the initial contract for the 1 year + 6 weeks for year one then setup reoccurring for fiscal year.
- Q4. What is the University's current CRM(s) and online application tool (s)?
A4. Currently use CampusNexus CRM with a homegrown online application but will be adding the common application for undergraduate students.
- Q5. Why is the University seeking a new CRM?
A5. Current CRM vendor is rolling out a complete platform change and we want to look at all options. We are also in the process of implementing a new strategic enrollment management strategy and one of the goals included a centralized CRM.
- Q6. What functional/operational issues with the current CRM is the University seeking to improve with a new system?
A6. As we move toward a focus of a more enterprise wide system we are looking at scalability.
- Q7. What other systems are being used by the University for recruitment and admissions (e.g. event management, email, scheduling, etc)?
A7. Various tools are utilized across the enterprise to include:
- Homegrown systems
 - Hubspot
 - Outlook
 - Eventbrite
 - Hobson's Connect
 - Constant contact
 - Office 365
 - AdmitHub
- Q8. Is the PNC responsible for both evaluations of responses and final negotiations or just the negotiating aspect? If the latter, who else will be involved in the response/demo evaluations?
A8. The PNC will be primary negotiator and will be collecting feedback from the entire campus community before making a final decision.
- Q9. Regarding "Appearance Before Committee"/vendor selection process, if invited by the University, is it mandatory for participation to be in-person?

A9. Highly desired so that the vendor can interact, in person, with our campus community.

- Q10. How many prospective suppliers will be invited to provide demonstrations for this project?
A10. Depends on first round review, expecting a handful, but if we have strong responses there is enough time built-in to account for more vendors.
- Q11. Has a date been scheduled for demos of potential solutions? If so, what date(s)?
A11. As stated on page 11 of RFP #40633 4/29/19 – 5/8/19 is set for vendor presentations and demos based on a prescribed scenario.
- Q12. Regarding the “Contract” section of the Terms and Conditions, as well as the section regarding “Competition”, is the University able to sign two contracts as a result of this RFP if the chosen/most advantageous solution is provided from multiple parties presenting a joint solution? This scenario would not be a subcontracting situation and has been deployed by many other universities.
A12. Our preference is no, so we are not mediating between vendors. This gives us a single point of contact for issue resolution.
- Q13. Regarding the Term of Contract, is the the University open to longer terms (e.g. five-six years) if advantageous to KSU? The cost proposal sheet contains a total of six years for the project.
A13. We are open to it. We will consider what is most advantageous for K-State.
- Q14. Has a budget been allocated and approved for this project?
A14. As a state agency, Kansas State University’s Purchasing Office does not release budget information.
- Q15. What is the University's budget for the project?
A15. As a state agency, Kansas State University's Purchasing Office does not release budget information.
- Q16. The “Product” section of the Scope of Work indicates an interest on enhanced/expanded offerings available. For the cost proposal, may we indicate the base costs to meet the all of the core requirements and provide additional documentation for a detailed breakdown of costs and optional/available components?
A16. Yes – though we are only guaranteeing the purchase of phase 1 we desire to see prices for other bundled portions as we move forward.
- Q17. Is there any interest/preference on solutions that also offer future expansion to work with current students/alumni/other departments across campus?
A17. Yes there is an interest to expand the use of a product after we focus on undergraduate recruitment across the university.
- Q18. How is the University currently integrating between the current CRM(s) and/or online application(s) with Peoplesoft?
A18. We batch nightly information from PeopleSoft to our current CRM. We have built and continue to maintain this interface in house. We must be able to create and/or modify all portions of integrations in house without the need for vendor assistance.
- Q19. What staff and resources does the University have to manage data integration? Is there a preference of the staff to work via API or other approach (e.g. batch file, direct to database)?
A19. We have staff onboard to manage data integrations but will need training and assistance with the initial rollout. Preference is API however, we need to know what is open for the API. This should include any additional fields we create as part of our business needs, not just application delivered data.
- Q20. Is there a requirement for the selected solution to have a vendor-managed implementation process including on-site meetings vs. DIY/self-implemented solutions?
A20. We are looking for a partner to assist with the implementation. We expect some visits to campus and would be interested in leveraging online meetings to keep travel cost minimal. We are not planning to implement the solutions in-house.
- Q21. Is there a requirement for some implementation meetings to occur on-campus?
A21. Yes

- Q22. What University staff have been/will be assigned to the project for implementation?
A22. Depending on the selected product: Project manager, team lead, technical lead(s), subject matter expert(s)
- Q23. Is there a plan to phase various elements of the CRM for Undergraduate Admissions ? If so, can you please share the plan?
A23. We need the critical elements for our August 1, 2019 timeline. Beyond that we will need to rollout other items, as needed, for business functions based on our recruiting cycle.
- Q24. How is the University currently reviewing submitted applications for Undergraduate and Graduate students?
A24. We currently utilize Peoplesoft for review and have an automated process for qualified admissions. Undergraduate admissions is implementing the common application. Graduate school uses CollegeNet.
- Q25. Is the University seeking an online application as part of the CRM for certain populations (e.g. Undergraduate or Graduate admissions) or is the expectation that the University will utilize the existing online application or Common Application? If the latter, does the University seek tools for application review?
A25. No we are implementing the Common Application.
- Q26. If the University is seeking integrated online application functionality, for which departments? Are there any specific functional requirements for an online application?
A26. We are not seeking an online application solution.
- Q27. For Undergraduate Admissions, what is the University's annual inquiry volume?
A27. Approximately 42,000 inquiries received per calendar year. An additional 7,000 departmental and event related inquiries are processed within our current CRM.
- Q28. For Undergraduate Admissions, what is the University's annual application volume (by department/category)?
A28. Approximately 16,000 undergraduate applications received per calendar year, 9,000 of which are new freshman, 2,500 are new transfers and 1,500 are international. The remaining amounts are for distance, non degree, readmits, high school concurrent and other misc populations.
- Q29. For Undergraduate Admissions, how many users will utilize the CRM across which departments? Please breakdown by 1) admin/power users who may need full system access and/or mass communication access and 2) basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access.
A29. Approximately full system 10-15 and basic/end users 250-300 – our challenge with this estimation if having an understanding of exactly what full system mass communication means.
- Q30. For Graduate Admissions, what is the University's annual inquiry volume?
A30. Due to the decentralized nature of our current process solution we are not able to provide an estimate at this time.
- Q31. For Graduate Admissions, what is the University's annual application volume (by department/category)?
A31. Approximately 4,000 applications received per calendar year.
- Q32. For Graduate Admissions, how many users will utilize the CRM across which departments? Please breakdown by 1) admin/power users who may need full system access and/or mass communication access and 2) basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access.
A32. There will be some duplication with same users having access to undergraduate. We approximate an additional 5-10 full system and 50-75 for basic end users.
- Q33. For Attachment A, is there a preferred mark/indicator for which delivery method we comply with (e.g. X, "Yes", etc)?
A33. Yes please use the following: Yes or No

- Q34. Regarding requirement Int-5 inquiries about various ERP systems; is the intent of KSU to integrate solely with PeopleSoft or other ERPs and/or campus systems?
A34. We want to be able to integrate with PeopleSoft but know that we may be changing ERP vendors in the future.
- Q35. Regarding requirement Int-15, what high school visiting schedule software is the University currently using and how is it being integrated with existing systems?
A35. No integrations have been done with our current CRM, however, it is preferred with our new CRM. We are using Hobson's RepVisits but we are also interested in other scheduling software as preferred by high schools or colleges.
- Q36. Is there a preference/requirement for solutions that offer unlimited email sending without per-contact/message costs?
A36. Our current system is unlimited. If your product has options for both pricing models please include details for both.
- Q37. Is there a preference/requirement for solutions that offer unlimited text messaging without per-contact/message costs?
A37. If offered, we would like to see cost options for both.
- Q38. Regarding Portal functionality, how many students and of which populations does the University anticipate engaging with portal environments? Please provide estimated amounts for Undergraduate and Graduate Admissions, separately.
A38. Portal may be considered for prospective undergraduate students and possibly a parent/family portal at a later date.
- Q39. Kansas State University (KSU) already had vendors on campus for demos?
A39. Not since the RFP has been released.
- Q40. What is the Kansas State University (KSU)'s current CRM systems in use?
A40. CampusNexus CRM
- Q41. Total number of applications received (Undergrad, Grad, etc.) – please clarify that Online application/Portal – may not be a part of the initial requirements. KSU currently has a homegrown application (KSU does not want to replace) and KSU will also implement the Common Application and it has yet to be determined that it will be downloaded into PeopleSoft or the new CRM. But, is KSU open to hear what might be available from a personalized Portal experience?
A41. Yes especially if we can provide links into our other applications.
- Q42. What will be the number of Users for the CRM and possible related roles:
Phase 1 Full Use, App Review, Work Study, etc.?
Phase 2 - Graduate Admissions? Distance Education?
A42. Phase 1 - Approximately full system 10-15 and basic/end users 250-300 – our challenge with this estimation is having an understanding of exactly what full system mass communication means.
Phase 2 - There will be some duplication with some users having access to undergraduate. We approximate an additional 5-10 full system and 50-75 for basic end users.
- Q43. What payment gateways are in current use at the Kansas State University (KSU) for Application fee payment, any paid events, orientation, enrollment deposits?
A43. Cashnet
- Q44. Approximately how many unique email addresses (contacts) does KSU include in email marketing campaigns? What is the approximate total of Email volume in any given year? For each potential phase.
A44. Approximately 8 million emails per calendar year to approximately 650,000 email addresses.
- Q45. Does KSU currently use an ETL (Extract, Transfer, and Load) solution for integrating PeopleSoft with any other systems on campus?
A45. We currently use webMethods

- Q46. Is there an estimated number of text messages that will be sent to prospects, apps, admits, etc.?
A46. We do not currently send text messages but we would like to have some ranges of options.
- Q47. Implementation – Go Live is scheduled for Aug. 1st – Please reiterate the pieces that MUST be in place and running versus the pieces where there is some flexibility to be completed shortly after.
A47. Same as Q7
- Convert undergraduate Fall 2020 prospects from the current system
 - Integration with our PeopleSoft system
 - Integration with our video wall
 - Send campaigns to targeted pool of undergraduate prospective students
 - Students to complete an online registration form
 - Have internal knowledge for us to create our own data imports and extractions but provide assistance along with training for initial integrations.
 - Interface with common application
 - Training for all phase 1 impacted staff held prior to August 1, 2019
 - Ability to schedule, plan, manage, and track campus visits.
- Q48. Please provide the number of users needed for your Enrollment solution, based upon your:
- a. Admissions Counselors and faculty members who review applications and contributes to admissions decisions.
 - b. Recruiters
 - c. Communication Specialists
 - d. Vice Presidents, Directors, and Assistant Directors of Admissions
 - e. Vice Presidents of Enrollment
 - f. Admissions Liaisons
- A48.
- a. 10-30
 - b. 25-35
 - c. 5-8
 - d & e. 32
 - f. 9
- Q49. Is KSU open to separating the technology platform from the customer facing solution (implementation) for RFP submission?
A49. We prefer an integrated solution.
- Q50. Can you please confirm that you are looking for a platform that scales enterprise-wide, or a point solution that fulfills the need/request of the current RFP.
A50. We are focused on Undergraduate recruitment but desire a solution that we can expand on over time.
- Q51. With regard to the timeline outlined in the RFP, can you please provide detail around the procurement process. What does it look like? Will there be any special requirements that need to be met by vendors.
A51. Please review bid instruction materials including timeline located on page 11.
- Q52. Category Integration/Interface: In addition to integrations from the CRM to PeopleSoft, Office365, EAB Student Success Collaborative, and Common App, are there any other anticipated integrations? If so, to which systems?
A52. Additional interfaces may include but not limited to – search/purchase names, housing and dining, video wall, and AcademicWorks. After implementation, it is critical for us to be able to create, edit, and fully manage the interfaces and integrations internally.
- Q53. Category Communication - Line 139: Does Kansas State University use google or google 360?
A53. We want to be able to track device specifications, location, unique visits etc... basic web analytics but if ability to tie to a contact in the system we would like to bring that data into the CRM.

- Q54. Category Communication - Line149: Can you please elaborate the use cases of text? i.e. survey customer service, promotion, alerts?
A54. We want to use texting as another medium of communication to our students. We want to utilize information in the system to drive text messaging.
- Q55. Category Communication:
a. How many contacts
b. What is the type and volume of communication (i.e. how many emails in a year)?
c. How many social accounts will Kansas State University be managing?
A55. a & b. Approximately 8 million emails per year to approximately 650,000 unique email addresses.
c. Yet to be determined how many social accounts we will be managing. This would be added functionality we don't have in our current CRM.
- Q56. Category Reporting Data/Analytics - Line 239: What specific BI tool and what is the need (what do you hope to do with it)?
A56. We will want to leverage BI tool(s) for accessing data stored in the CRM, which may include structured and unstructured data. Please list what options exist for connecting tools such as this to your application. We currently have a separate initiative to develop a data warehouse.
- Q57. Throughout the RFP, it is mentioned a number of times that the contract will be awarded 7/1/19 with the implementation completed expected 8/1/19. Does KSU expect that all business analysis and implementation will be completed in 1 months time?
A57. The contract term will begin the on Date of Award. The Timeline listed on page 11 is a guideline for this RFP and project and is subject to change as necessary. It is our intent to award by May 15, 2019.
- Q58. Could the recording for the Pre-Proposal Conference held on 3/13/19 via Zoom be provided to vendors?
A58. Our official method of responding to questions is handled by requiring vendors to submit written questions per the bid instructions with University responses to those questions provided via addendum.
- Q59. What KSU staff have been/will be assigned to the project for implementation?
A59. We will have project management, team lead, technical lead(s), and subject matter expert(s).
- Q60. How many other respondents is KSU expecting to respond to this RFP?
A60. This is unknown at this time.
- Q61. How many users does KSU expect will need to use the CRM system?
a. Full users?
b. Limited use users? I.e. Read-only access if any - could KSU describe how they envision limited use users will use the system?
A61. Phase 1 - Approximately full system 10-15 and basic/end users 250-300 – our challenge with this estimation is having an understanding of exactly what full system mass communication means. Phase 2 - There will be some duplication with same users having access to undergraduate. We approximate an additional 5-10 full system and 50-75 for basic end users.
- Q62. Does KSU envision the CRM chosen for admission will eventually be used across the lifecycle stages? I.e. Student Success/engagement and Foundation//Advancement/Alumni Relations?
A62. Yes. Our goal is to select a product that provides opportunities to use across the entire student lifecycle. However, we are only committing to the initial phase 1 Undergraduate recruiting.
- Q63. Does KSU currently leverage an iPaaS to move data between Peoplesoft and other back office systems? If so, which is used?
A63. WebMethods is currently on premise but in process to move to the cloud.
- Q64. Does KSU leverage both a CRM and Marketing Automation platform currently to manage outreach to students? If so which is used? Is KSU open to replacing this Marketing Automation platform as part of this procurement?

A64. Currently, the marketing automation is part of the CampusNexus CRM platform. Yes this functionality will be replaced.

Q65. How many contacts does KSU expect to interact with via email on an annual basis?

A65. Approximately 650,000