



Solicitation Information

January 11, 2018

Addendum #2

RFP # 7577484

TITLE: Customer Relationship Management Software – Rhode Island College

Submission Deadline: January 31, 2018 at 11:00 AM (ET)

ATTACHED ARE VENDOR QUESTIONS WITH STATE RESPONSES. NO FURTHER QUESTIONS WILL BE ANSWERED.

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Division of Purchases**

Vendor A

1. Has Rhode Island College (RIC) already had vendors on campus for demos?
 - a. **No**
2. Does Rhode Island College (RIC) currently have a CRM and is looking to replace it, or will this be the first CRM in place at the College?
 - a. **No**
3. Does Rhode Island College (RIC) currently use a separate email marketing solution outside of Hobson's?
 - a. **Admission Office is using Constant Contact.**
4. How many unique email addresses does Rhode Island College (RIC) include in email marketing campaigns?
 - a. **Rhode Island College only issues email accounts to admitted degree and to non-degree students who enroll to RIC courses. RIC issues one email account per student.**
 - b. **Total number of all students enrolled fall 2017 is 10,717.**
 - i. **Total number of degree students for both undergraduate and graduate studies is 10,500.**
 1. **Total number of undergraduate students who has advisors assigned is about 8,800 and total number of advisors is about 360 as of today.**
 - ii. **Total number of non-degree students for both undergraduate and graduate studies is 7,400.**
 - c. **Admission office estimates the total number of unique personal email accounts they contact is around 6,000 to 7,000 prospects.**
5. How many users will use SMS texting and what is the anticipated volume?
 - a. **RIC sends text messages to 11,728 cell phones (students, faculty and staff) for college wide announcements (usually class cancellations, delays.**
 - b. **300 students in the PEP program are receiving text messages using the vendor Signal Vine.**
6. Does Rhode Island College (RIC) currently use an ETL solution for integrating Ellucian Colleague with any other systems on campus?
 - a. **RIC currently does not have any other CRM solutions. RIC uses Oracle/PeopleSoft, not Ellucian/Banner.**
7. What level of Social Media Integration is Rhode Island College (RIC) looking for?
 - a. **We are using: Facebook, Twitter, Instagram, Google+, YouTube, LinkedIn.**
 - b. **We need this product to integrate with all of the above social media platforms.**
8. How many users of the Chat functionality will Rhode Island College (RIC) need?
 - a. **Total number of all students enrolled fall 2018 is 10,717.**
 - i. **Total number of degree students for both undergraduate and graduate studies is 10,500.**
 - ii. **Total number of non-degree students for both undergraduate and graduate studies is 7400.**
 - b. **All prospects (about 6,000-7,000)**
 - c. **About 500 RIC faculty/staff should have the access to this feature**
9. What payment gateway does Rhode Island College (RIC) currently use?
 - a. **We currently use CashNet for processing students' online tuition payment.**

10. What telephone system does Rhode Island College (RIC) currently have and is it already being used with “call center” functionality?
 - a. **RIC currently does not have an “official” call center – we do not track phone calls. The telephone system is Avaya Aura Session/System Manager.**
11. Will Rhode Island College (RIC) implement the CRM in phases (e.g. Recruitment and Admissions, then Alumni, then Student Success)? Which is a priority?
 - a. **Yes, we are looking for recommendations from the selected vendor. However we will implement recruitment/admissions and student success first. We have not decided if we will add alumni to this CRM.**
12. Is Rhode Island College (RIC) willing to consolidate and do away with duplicate systems when the CRM can incorporate the functionality of current solutions?
 - a. **RIC will seriously review if the new CRM product overlaps with any other existing systems.**
13. How many applications are received on an annual basis?
 - a. **RIC receives around 5,000 to 6,000 undergraduate applications annually.**

Vendor B

1. Student Advising - Section 2. Background states the following in the RFP: “Targeted campaigns from offices within the Division of Student Success with content that could include reminders, announcements, and invitations. Track all interactions with prospective students, matriculated and non-matriculated students, stopped out students and alumni whether they be by phone (voice & text), in person in office, in person out of office and email. The goal of tracking student interactions across the division would be to highlight gaps and identify where students are unsupported and the College can build and reallocate resources. Provide an interaction score to gauge engagement in student life cycle based on email click rates, phone calls and attendance at fairs and college programs. Ability to flag students for early interventions for support in academic, behavioral, health and financial needs. Identifying common obstacles, and their system indicators to highlight students who may be at risk, enabling us to connect students to resources. Developing into a risk stratification based on factors gathered through use.” However, in Section 3.1.02 (PeopleSoft Integration), the RFP states: “RIC requires this same level of CRM programming to all enterprise systems like EMS, BlackBoard, Raiser’s Edge and our new Student Advising system (EAB or Starfish) which will be simultaneously implemented with CRM. ”
 - a. Is the RFP seeking a Student Advising component as part of the Enterprise CRM that includes student communications, interaction tracking, engagement scoring, and early warning capabilities? If so, a new Student Advising system may prove redundant with increased costs.
 - i. **RIC ANSWER: If the CRM product comes with an Advising component, RIC will evaluate its features. RIC will select and decide the features/components to implement based on careful review of the vendor and its feature comparisons against other systems/products RIC has or is reviewing.**
 - b. How many students will receive advising services?
 - i. **Total number of undergraduate students who has advisors assigned is about 8,800 as of today.**
 - c. With what frequency do you anticipate students accessing an advising system per month (i.e., 4 logins/per user/month)?
 - i. **Various by seasons. As of now, many of the advising work is done via student/advisor 1-on-1 meetings. We expect that, you, as the vendor that has the experience in implementing your product in other schools, should know the expected frequency based on your experience.**
 - d. How many full-time advisors will access the system?
 - i. **We have 1 full time advisor.**
 - e. How many part-time advisors will access the system (i.e., professors)?
 - i. **We have about 360 part time advisors in the system.**
2. Ecommerce Solutions
 - a. What is the volume of e-commerce revenue (annually) that will pass through the CRM system (in relation to General requirements in Section 3)?
 - i. **As of now, the college collects tuition online via the current PeopleSoft system.**
 - ii. **For campus events, having an e-Commerce feature for collecting some fees will be great. We have thousands of registrations for various events and collected revenue has been under \$100k annually (since most of our events are free). However, RIC is interested in collecting more revenue using this tool.**

3. Recruiting and Admissions

- a. How many individuals require system access for recruiting and admissions (i.e., recruiters, recruiting supervisors, executive management, etc.)?
 - i. About 10 staff members and 15 student workers.**
- b. What Admissions functionality do you expect to retain in PeopleSoft, and what do you expect to be delivered by the new CRM? For example, it appears you want the undergrad and grad application forms be driven by the CRM, but where will the application reading and acceptance process occur? Does RIC accept the Common App? Will those continue to be processed through PeopleSoft? Will the student Admissions portal now be driven by the CRM, including the Admissions checklist and decision announcements or will these continue to be driven by PeopleSoft? Will grad and undergrad differ in the answers above?
 - i. During vendor selection, we will decide which features we will continue to use through PeopleSoft and which features we will start using through the CRM.**
 - ii. Yes, RIC accepts the Common App for undergrad applications and CollegeNet for graduate applications.**
 - iii. Undergrad applications will continue being processed through PeopleSoft.**
 - iv. The application reading and acceptance process occurs using our new document imaging software, Perceptive Content.**
 - v. We do not currently have a portal for applicants to access their decisions (we mail them) however we do use PeopleSoft checklist system in conjunction with Perceptive Content.**
 - vi. Yes, the graduate program uses a different process and different tools for their application processing and review.**

4. Integration

- a. How many total API calls do you anticipate per day across the various integration points described?
 - i. Currently, we do not have any active API calls built in any of the existing college systems. The actual need for building the API calls will really depend on the selected vendor and the need for integrate its product with our existing systems.**

5. Call Center Support

- a. How many individuals will require system access from service, help desk, and call center teams? Is there any overlap in these individuals and those responsible for recruiting and admissions or student advising? If so, how many?
 - i. This question is related to the actual business processes for using the new CRM product. As of now, RIC has a dedicated User Support Services team of a dozen staff and students handling normal operational requests from students and faculty/staff members. At the same time, the Admission Office's staff handles requests from applicants exclusively. Each office has their own front office staff that serves as a 'call center', however none of the calls are logged.**
 - ii. If this new CRM software's call center handles both, please suggest best practices, based your experiences from other schools.**

6. Customer Portal
 - a. Outside of student advising, how many customer visits do you anticipate to the portal on a monthly basis? How many unique visitors?
 - i. **As of now, RIC only allows students, faculty and staff to access our portal. Therefore, the actual unique visitors will be around 20,000 (students, faculty and staff combined).**
7. Multi-Channel Support
 - a. Phone calls, chat, and email were referenced in this section. Is SMS texting a requirement for multi-channel?
 - i. **Yes**
8. Timeline and Scope
 - a. The RFP states an interest in starting in April and being completed in the Fall of 2018, with additional phases to follow. We would expect that to be the strategy as completing an enterprise-wide CRM in 6-7 months is not possible. Therefore, can you please confirm the specific areas you want completed by the Fall of 2018 and is this the work for which pricing is being requested in this RFP for licenses and services?
 - i. **We understand that this CRM will not be fully functioning in fall of 2018, however we will defer to the vendor selected as to the ideal implementation timeline the college should follow.**
9. Budget and Background
 - a. Has a budget been established for the purchase of the software and services for this project yet, and if so, can you advise the budgeted amounts as this will inform the solution design of the project?
 - i. **Yes, a budget has been established however we cannot disclose that amount.**
 - b. Who is the executive sponsor for the enterprise CRM project?
 - i. **Jason Meriwether, Vice President of Student Success**
 - c. What software solutions have been reviewed or discussed as part of the preparation of this RFP?
 - i. **RIC has not yet formally reviewed or discussed any software solutions as part of the preparation of this RFP.**
10. Migrations and Integrations
 - a. Several systems are identified for integration, are any systems expected to be replaced with this project? If so, please advise the tables and records of data which will need to be migrated?
 - i. **As of now, no existing system is expected to be replaced with this project. If the selected product can make a case to replace any of the existing systems, please clearly state that in your bid and illustrate your features.**
 - b. How much of the work around migrations and integrations is RIC prepared to undertake?
 - i. **Once RIC selects a product, the RIC team is ready to work with the vendor to complete the implementation and integration with 100% collaboration. We want this project to be a successful one.**

11. Other Questions

- a. What is the data warehouse in use?
 - i. RIC only has a very small data mart.**
- b. What systems would fall under the integration type of “Misc“ listed in 3.1.30?
 - i. This “Misc” category could include those products that RIC is thinking buying, but have not yet materialized.**

12. Under General Requirements:

- a. RIC states the CRM should include full e-commerce features. Please describe the expectation for this in more detail.
 - i. This really depends on the product. As of now, students at RIC pay their tuition online. If the CRM product has e-Commerce features, please list them and indicate what they are for.**
 - ii. Please see our responses in the e-commerce section above.**
- b. RIC outlines a need to support students registering for courses for certificate completion. Is the CRM to support non-matriculated programs as well? If so please provide details of what is used now and what will be involved in this scope including enrollment forms, program management, financial management and student facing portal? Is this related to the interest in e-commerce features?
 - i. This CRM product will have to be integrated with our PeopleSoft system that manages the whole student life cycle from admission to graduation (degree seeking and non-degree seeking). If the CRM product provides some features for advising or course management (such as enrollment management, etc.), etc., please list and explain them clearly.**

Vendor C

1. In reference to General Requirements item number 3 Please elaborate with 2 or 3 business use cases for the following requirement “full e-commerce features.” For example, a click here to buy a t shirt type of communication that redirects to a commerce site or do you want a full shopping and check out solution similar to an amazon.com or bestbuy.com that handles the entire fulfillment processes including inventory control and payment processing of merchandise for purchase?
 - a. **This really depends on the product. As of now, students at RIC pay their tuition online. If the CRM product has e-Commerce features, please list them and indicate what they are for.**
 - b. **For campus events, having an e-Commerce feature for collecting some fees will be great. We have thousands of registrations for various events and collected revenue has been under \$100k annually (since most of our events are free). However, RIC is interested in collecting more revenue using this tool.**
2. Is external facing co-browsing a requirement?
 - a. **No, not a requirement. However, if your product has this feature, please list it as your strength.**
3. In reference to 3.1.11 Please elaborate with 2 or 3 business use case as explanation for the following: CRM systems must enhance field support operations such as scheduling, dispatching, and other related processes.
 - a. **This is more about RIC’s intention to help our students and applicants – RIC wants to use CRM as a tool to reach out to them. If features such as scheduling, dispatching, and other related processes are part of the features of your product, please state them clearly.**
 - b. **We want to be able to track every interaction a student has with different offices across campus to ensure the student’s needs are being met and to increase recruitment and retention.**
4. In reference to 3.1.08, please elaborate with an example of what you mean by: “competitor tracking” What is the definition of competitor? Is this schools you compete with to recruit students?
 - a. **Competitor tracking is defined as collecting the information from student who do not matriculate at our institution and where they are attending. Additionally, having access to compare data from institutions that mirror ours will be ideal for reporting purposes.**
5. Is SMS and or MMS a channel of communications within scope of this RFP? If so do you have a current SMS provider that you would like to continue using? Do you anticipate messaging to international numbers?
 - a. **SMS/MMS can be part of the communication tools for RIC to use to reach out to its students and applicants. RIC uses two vendors, one to send emergency alerts to students/faculty/staff (about 12k students) and another to communicate with a subgroup of the student population (about 300 students).**
 - b. **There will be minimum need for RIC to use this service beyond US.**
6. Are any of your departments currently running a CRM solution and if so what is it?
 - a. **No.**
7. How many employees of Rhode Island College do you anticipate will be logging in and using the CRM software?
 - a. **About 500 faculty/staff/student workers need to be able to access the CRM at any given time.**

8. How many individual email addresses do you currently communicate with?
 - a. **Rhode Island College only issue email accounts to admitted degree and to non-degree students who enroll to RIC courses. RIC issues one email account per student.**
 - b. **Total number of all students enrolled fall 2018 is 10,717.**
 - i. **Total number of degree students for both undergraduate and graduate studies is 10,500.**
 1. **Total number of undergraduate students who has advisors assigned is about 8,800 and total number of advisors is about 360 as of today.**
 - ii. **Total number of non-degree students for both undergraduate and graduate studies is 7,400.**
 - c. **Admission office estimates the total number of unique personal email accounts they contact is around 6,000 to 7,000 prospects.**
9. How many total individual email addresses do you anticipate communicating with annually based on your vision of your new CRM solution (including current students, alumni, friends of the College and prospective students)?
 - a. **RIC has a separate system handles alumni, friends of the college.**
 - b. **Admission Office – 6,000 to 7,000 prospects.**
 - c. **RIC’s total number of all students enrolled fall 2018 is 10717, and that’s the total number email addresses that RIC is anticipated to contact.**
10. How many messages do you currently respond to on Social Media monthly?
 - a. **Each department independently manages their own social media platforms so we do not have a figure for this question. We may respond to messages only to defer their question to a RIC issues email (admissions@ric.edu etc) or phone # of the department.**
11. Which Social Media Channels are you currently to engage with your constituents on (i.e. Twitter, Facebook, Snap Chat, Google+, LinkedIn)?
 - a. **We are using: Facebook, Twitter, Instagram, Google+, YouTube, LinkedIn**
 - b. **We need this product to integrate with all of the above social media platforms.**
12. Would it be acceptable to RIC for the Bidder Certification Form to be signed electronically in lieu of an ink signature?
 - a. **Original signature, please.**
13. Can you please document anticipated steps to be taken after your review of the RFP responses (for example, vendor presentations/demonstrations) and the timing of those events?
 - a. **A RIC Committee will review all qualified proposals. The Committee will select top rated vendors, and invite them to do demos.**
 - b. **A decision (with or without a selection) will be made by the Committee, and final decision will need to be approved by the State.**
 - c. **It might take 1~2 month before a contract can be signed.**

Vendor D

1. How many contacts do you anticipate marketing to in your database?
 - a. **Including current students and prospects the figure is about 15,000. We have not yet identified a solution for our alumni network of at least 65,000. The Alumni solution is beyond the scope of the intent of this RFP.**
2. What is the total e-mail volume you anticipate sending annually?
 - a. **Rhode Island College only issue email accounts to admitted degree and to non-degree students who enroll to RIC courses. RIC issues one email account per student.**
 - b. **Total number of all students enrolled fall 2018 is 10,717.**
 - i. **Total number of degree students for both undergraduate and graduate studies is 10,500.**
 1. **Total number of undergraduate students who has advisors assigned is about 8,800 and total number of advisors is about 360 as of today.**
 - ii. **Total number of non-degree students for both undergraduate and graduate studies is 7,400.**
 - c. **Admission office estimates the total number of unique personal email accounts they contact is around 6,000 to 7,000 prospects.**
3. What is the total text or SMS volume you anticipate sending annually?
 - a. **Total number of cell phone numbers to which RIC send alert text messages is 11,728. This number includes all students, faculty and staff.**
4. How many landing page visits do you anticipate annually?
 - a. **The total number of hits to RIC Portal for the year of 2017 is 1.9 million.**
5. How many business units or departments will be utilizing the solution?
 - a. **About 12 departments under the Student Success division will need to utilize the solution. This does not mean that we will need a configuration for each department but rather a financial aid officer will need to be able to review how many times a student has contacted the college about a specific issue.**
6. Do your business units require separate data security, content, and reporting? Or can they work in a shared environment?
 - a. **We will need to know the system features first before answering this question. While some information can be shared across multiple offices, and some cannot. Field level security and the functions that prevent adding or deleting of records and data for each contact record will be features we require.**
7. How many users do you anticipate will be using the solution?
 - a. **If a user is defined as an administrator than we have about 500 faculty/staff**
 - b. **If a user is defined as a constituent than we have about 15k (matriculated students, non-degree and prospects).**

8. If applicable, please list approximate number of users by business unit (i.e. Ticketing - 5, Admissions - 10, Alumni - 6):
- a. **The following is the list of departments might be using the CRM product, with the estimated staff numbers. It is possible that some of the staff members in these office will not be using the CRM product:**
 - Admissions – 12
 - Athletics – 30
 - Career Development - 10
 - Counseling Center -15
 - Financial Aid -12
 - Health Services – 5
 - Learning for Life – 15
 - Student Life – 10
 - OASIS – 30
 - Records Office -12
 - Upward Bound – 10
 - Faculty – 360
9. How many social accounts do you anticipate will be managed by the solution?
- a. **We will need to know your product and your product features first before we can decide how many social accounts RIC may need to have. Typically all of our social media accounts are managed by each office independently.**
10. How many social conversation topics will you be listening to?
- a. **We do not track social conversation topics, if you have the features we'd like to explore our options.**
11. Please list the social conversations topics you would like to listen to (i.e. - my school, peer schools, trends)
- a. **We do not track social conversation topics, if you have the features we'd like to explore our options.**
12. How many contacts will you be advertising to?
- a. **6,000 to 7,000 is our current prospect pool however this does fluctuate.**
13. How many audiences will you be advertising to? (i.e. - prospects that don't open my e-mails, alumni interested in topic X)
- a. **Having the ability to track open/bounce rates on emails will allow us to customize our outreach efforts. We currently do not track this now, most of our email outreach is broad announcements and we'd like to change that using the CRM.**
14. What type of support requirements are important to you?
- a. **Support is expected to be available during normal college business hours.**
15. How do you plan on implementing the marketing solution?
- a. **RIC will develop an implementation timeline and process for our marketing solution based on the product and features the select vendor has available.**
16. If applicable, which consulting partner are you working with / considering?
- a. **We expect that you, the owner of your product or certified vendor/partner, to be the one to implement your product.**

- b. Currently, RIC does not have any consulting partner on this project.**
17. What types of training options do you prefer?
- Please list all of the training options so that RIC can select the one that fits our needs best.**
 - We have used online guided and self-paced training for administrators. Having an onsite CRM trainer doing live demos with our departments would be ideal. We would also facilitate a train the trainer model and have existing staff become a CRM administrator on-campus to support after training is over.**
18. Based on all your responses, what type of growth do you anticipate in the next 3 years? (i.e. - increase by 10%, 10 departments, 100 users)
- Our growth trajectory is modest and has been steady for the past 5 years and we expect it to remain the same for the foreseeable future.**
19. What is the projected timeline to get started?
- We anticipate the project to start the summer of 2018.**
20. Has a budget been allocated for the marketing initiative?
- No budget has been allocated for the marketing initiative. We do have a budget for the CRM as a whole, but cannot disclose that information.**
21. Do you require deliverability reporting? (i.e. - 97% inbox rate to Gmail, 92% inbox rate to Comcast)
- Yes, we expect the CRM to have the ability to report on metrics of email delivery regardless of email platform. Our expectation is that the CRM will track all interactions (email, text messages, phone calls and drop-in meetings) that can occur with a student. For example, if a student receives several emails, we need to know which ones they opened in the event they contest they have not received the information.**
22. Would you like to preview your communications across different devices/browsers? (i.e. - view e-mail preview on iPhone 6, AOL, Tablet)
- Yes**
23. Will you require multiple IP addresses or domain names? If so, please describe:
- It really depends on your product's requirement. RIC is prepared to set up as many IP addresses/Domain names as needed. The key is, you will need to clearly state how to implement your product properly.**
24. Will you require a full marketing sandbox to do integration and data testing?
- Yes.**
25. Would you like to project engagement across digital displays at events or on campus? (i.e. - social feed walls, heat maps, trending topics?)
- Yes.**
26. Would you like to automate social activities? (i.e. #applynow, #givenow, #buynow triggers a text message to act?)
- Yes.**
27. Do you require lead engagement scoring or lead quality grading?
- Yes.**
28. Do you require closed loop reporting? (i.e. this lead cost me \$5 from Google and yielded X\$ in revenue)
- Yes**