

**REQUEST FOR PROPOSALS #2021-012**  
**Customer Relationship Management Solution**  
**RESPONSE ADDENDUM # 1**  
**January 22, 2021**

**CLARIFICATIONS**

1. RFP Section 1.3.1 – Response to Written Questions
  - a. This Addendum 1 is a partial submission.
  - b. Remaining responses will be available by end of day January 29, 2021.
2. Deadline for Proposal Submission is modified to **February 12, 2021 by 11:59 p.m. EST**

**QUESTIONS**

1. Which EAB product is currently in use at the University of Maine System?

**ANSWER:**

- EAB Navigate
- EAB Advisor Tool
- EAB Email Tool to Generate Applications
- EAB Student Success – Student Engagement/Student Activities

2. Which Front Rush product is currently in use at the University of Maine System?

**ANSWER:**

UMaine - FR TRAC (Scanner, Equipment, Onsite Setup)  
UMF – Design Email, Essentials Department, Team Olympic, FR Pass Admissions Integration  
USM - Design Email, Team Olympic, FR Pass Admissions Integration

3. What other systems are being utilized by recruitment and admissions beyond the current CRM and/or online application system(s)?

**ANSWER:** Refer to question 1 above and RFP Appendix H General Requirements Questions, Item 4.

Texting Tools – Signal Vine, Mongoose, 360 SMS, SMS Magic  
Form Tools – Form Assembly, Form Titan  
Merge Tools – Conga, Apona, Peoplesoft Lettergen, Filemaker  
Record Tools - Demand Tools  
Event Tools – VisitDays, Zoom, TargetX Event  
Scheduling Tool - You Can Book Me

4. Does UMS leverage a software for student success / student advising? If so, please specify the product(s) within each institution.

**ANSWER:** Navigate (EAB)

5. Can you describe any marketing KPIs you are hoping to (or currently) track beyond what is listed for Email metrics?

**ANSWER:** What we have listed is what we are hoping to track.

6. Do you work with an external lead generator/online program manager? If yes, will they need access or integration to your systems (CRM or marketing platform)?

**ANSWER:** Depends on the campus business practice and will greatly depend on the solutions offered.

7. Is the System interested in considering additional solutions/services related to core RFP requirements (e.g. enrollment marketing services, etc)?

**ANSWER:** We have RFP Appendix C Exhibit 4 to allow Respondents to provide additional components for campus consideration.

8. Can you please provide the titles of the members of the proposal evaluation team?

**ANSWER:** Sorry no

9. Does UMS have an organizational change management team you will be using as part of this engagement or looking for support from the partner.

**ANSWER:** No.

10. Do you envision the need for Business Process Analysis or Redesign as part of the project?

**ANSWER:** Dependent on functionality provided in the solution offered and needs of the stakeholders.

11. Is there a preference/requirement for solutions that can expand in the future further across campus beyond admissions (e.g. student success, advancement, etc)?

**ANSWER:** No, however we have RFP Appendix C Exhibit 4 to allow Respondents to provide additional components for campus consideration.

12. Has the System seen demos of any potential CRM solutions or related technologies in the last 12 months? If so, which ones?

**ANSWER:** The evaluation team has not seen demos in the past 12 months. The extent of others seeing demonstrations is unknown.

13. Has the System worked or consulted with any vendors and/or external sources in the development of the requirements for this RFP? If so, please identify.

**ANSWER:** No

14. How many prospective suppliers will be invited to provide demonstrations for this project?

**ANSWER:** This will be an evaluation team decision based on the responses provided.

15. Has the Univ of Maine System completed any pre-work in analyzing common data points or [are] you looking for you partner to complete this discovery?

**ANSWER:** Due to the SIS, there are some common data points already used. Respondents should include procedure and costs for completing discovery.

16. We understand that the Excel with the filename of "04-2021-012-RFP-IT-CostTemplate") is to be completed and submitted in its native Microsoft Excel format. However, we are not clear whether the content of that Excel should also be included in a separate PDF or Microsoft Word proposal document. For example, the RFP's section called "INSTRUCTIONS FOR – Exhibit 1 (Table 1) - Licensing and Maintenance Agreement Pricing and/or Data Maintenance / Subscription Pricing" (beginning on p. 32) shows tables taken from that cost Excel. Does this mean that we are to also include the Excel's cost tables in a PDF or Word document in addition to providing those tables to you in their native Excel files? Or, is the content in "04-2021-012-RFP-IT-CostTemplate" to be provided to you only in Excel format?

**ANSWER:** Please provide the information in an excel document.

17. Similar to our above question, we understand that the file called "05-2021-012-RFP-IT-SolutionRequirements" is to be completed and submitted in its native Microsoft Excel format. However, should the content (including vendor's answers) for "05-2021-012-RFP-IT-SolutionRequirements" also be included in and submitted to you in

separate PDF or Microsoft Word proposal document? Or should that content be submitted back to the university only in its original Excel format? If it needs to be submitted in a separate PDF or Microsoft Word proposal document (in addition to its native Excel format), into which proposal section should its content be inserted?

**ANSWER:** Please provide the information in an excel document.

18. Will the System require demos in person?

**ANSWER:** No, refer to RFP Section 1.3.1

19. Will the System require live demonstrations (vs recorded videos)

**ANSWER:** Live via Zoom

20. Will the System be holding demonstrations from shortlisted vendors prior to vendor selection?

**ANSWER:** Yes, refer to RFP Section 1.3.1

21. What is the current guidance and vision regarding preferences for consultant travel and onsite activity to support this project? Should vendors consider some onsite activities toward the conclusion of the engagement may be requested or possible?

**ANSWER:** With the current travel environment, it would not be required. Collaboration/meeting sessions could be done using a remote meeting tool.

22. If UMS is a current customer, can UMS serve as its own reference for this project?

**ANSWER:** Respondents should add references outside of the University of Maine System.

23. For this RFP/project, can the System please confirm which universities/entities will be utilizing the new system under this initial procurement? We noticed that the campus thumbnails in section 1.1.2 reference 8 campuses but did not include the University of Maine at Machias or Maine Community College System despite being mentioned elsewhere in the RFP.

**ANSWER:** University of Maine, University of Southern Maine, University of Maine at Augusta (undergraduate), University of Maine at Farmington (undergraduate)

University of Maine at Machias is now an entity within the University of Maine (Orono) campus.

Maine Community College System (MCCS) is a separate entity which we are extending option for MCCS to at its option use the solution awarded.

24. Does the University of Maine System currently have a governance model for the 9 areas working together in a single org?

**ANSWER:** The University of Maine System does not have an official governance model. It is being developed as collaborations increase.

25. Are there any systems UMS plans to retire following this project engagement? If yes, please explain further.

**ANSWER:** The answer is dependent on the award of this RFP.

### **CRM OVERVIEW QUESTIONS**

26. What are the driving objectives to move off of your current system(s) to a common CRM and what benefits are you looking to realize that are not available now either due to the use of separate systems or the capabilities of the individual systems?

**ANSWER:** Refer to RFP Section 1.1.3 Purpose.

27. Can you please describe the roles of the users of the CRM? For example, admissions counselor, admissions director, etc.

**ANSWER:** CRM Admin, Admissions Counselor, Student Employee, Admissions Staff, Faculty, Administrative (read-only access), Dean / Management Level, Marketing, Print, International, Center Staff

28. Will the CRM be utilized solely by the undergraduate and graduate departments at each university/entity, or will other departments be involved? If other departments will be involved, please identify.

**ANSWER:** Dependent on functionality provided in the solution offered and needs of the stakeholders.

29. Is it the System's intent for there to be one centralized CRM instance shared by all participating universities, or is the System interested in multiple instances of the same CRM system/technology with individual instances for each university?

**ANSWER:** Dependent on functionality provided in the solution offered and needs of the stakeholders for things like; permission structure, data segmentation, etc.

We have requested pricing in Appendix C please provide pricing for both options.

30. If the System is interested in options for multiple instances of the same solution for multiple institutions/campuses, how should that be reflected within the pricing response document?

**ANSWER:** In Appendix C we need individual campus pricing and enterprise pricing/group pricing.

31. If all institutions/campuses will be operating within one shared environment, how will the System manage varying processes between institutions?

**ANSWER:** Refer to Addendum 1 Questions 23, 28, 29, 30.

32. Can the System please expand on the rationale for the decision to centralize vs decentralize the new CRM?

**ANSWER:** Centralized Benefits – Ideally, we would like to see consistent reporting, shared responsibilities, student look and feel consistency, cost savings, centralized support at the campus level.

Decentralized Benefits - Maintain own level of processing and meet the needs of specific campus requirements.

33. Related to the above, how does the System plan to govern the new CRM? Will governance be centralized at the System level with involvement from the respective campuses or decentralized at the university level?

**ANSWER:** We would likely use a central governance team with members from each campus. This will depend on the vendor's solution and are ability to move to a centralized model.

34. What other systems are being utilized by recruitment and admissions beyond the current CRM and/or online application system(s)?

**ANSWER:** Refer to question 2 and RFP Appendix H(4).

Texting Tools – Signal Vine, Mongoose, 360 SMS, SMS Magic

Form Tools – Form Assembly, Form Titan

Merge Tools – Conga, Apona, Peoplesoft Lettergen, Filemaker

Record Tools - Demand Tools

Event Tools – VisitDays, Zoom,

Scheduling Tool - You Can Book Me

35. For these additional systems, is there a desire/intent to have any of these replaced by the new CRM? If yes, please identify which ones?

**ANSWER:** Depends on the solution offered and cost. Please provide pricing for any add-on tools in Appendix C, Table 4

36. Why is the System seeking a new CRM?

**ANSWER:** Refer to RFP Section 1.1.3.

37. What functional/operational issues with the current CRM and/or online application is the System seeking to improve with a new system?

**ANSWER:** Refer to RFP Section 1.1.3.

38. Does the System have any desires to move away from a managed package and to a native-first approach for the Salesforce platform/CRM?

**ANSWER:** It depends on the solutions provided.

39. Outside of a student portal, are there any other types of portals the University of Maine System would like to use? Some examples could include a parent portal, a portal for international agents, etc.

**ANSWER:** There is interest of having additional portals for other departments within the campuses; e.g. athletics, faculty.

40. What type of communication journeys do you currently have in place, please describe? Are you looking for your chosen partner to migrate any/all of these to the new system?

**ANSWER:** Refer to Addendum 1 Questions 1 and 3. The second part of your question will greatly depend on the solutions offered.

41. What TargetX functionality is each campus using? (Events, Online Application, Application Reader, Email, etc...)

**ANSWER:** Refer to Addendum 1 Questions 1 and 3.

42. Would the School/Inquiry Scoring 'algorithm' be unified across campus's or unique to each? What is the criteria/data points if available?

**ANSWER:** Campuses may have differing criteria and/or data points.

43. Does UMS track the location of UMS assets (ex. vehicles, equipment, etc.)? Is tracking location of vehicles / equipment of interest, and if so, for how many assets would UMS want tracking capabilities?

**ANSWER:** We are not currently using our CRM for this purpose and it would not be a priority to do so once implemented.

44. Does UMS have a universal student records that includes biographic, demographic, academic and engagement data? Please specific per campus.

**ANSWER:** biographic (yes), demographic (yes). Academic and engagement data may differ by campus.

45. Does UMS maintain a student website / portal / community through which students can receive information and request services of UMS? Please specific per institution.

**ANSWER:** Yes – each campus has their own portal – multi campus students have access to campus specific resources from their “home” campus portal

## **SALESFORCE**

46. Is Salesforce Identity Connect desired for Active Directory connection with Salesforce?

**ANSWER:** Would be interested in this as an option, but not a requirement.

47. Is Salesforce myTrailhead desired?

**ANSWER:** Would be interested in this as an option, but not a requirement.

48. Do you plan to procure one new Salesforce instances or use an EDA existing instance? Do you or will you have a full Sandbox available?

**ANSWER:** It depends on the solution provided. UMS does currently have one Salesforce instance with EDA. We would strongly prefer the availability of a sandbox.

49. Are any of the existing Salesforce orgs utilizing 3rd party tools off of the AppExchange (Form Assembly, Conga Composer, DemandTools, Interactions for Higher Education, etc...)?

**ANSWER:** Refer to Addendum 1 Questions 1 and 3.

50. Is there a desire to use BI (i.e. Salesforce Einstein, Tableau) tools to drive valuation of Inquiries or Schools, instead of specialized algorithms?

**ANSWER:** Respondents should include information about any solution they feel relevant based on industry best practices.

51. Will this project be executed in a new Salesforce Org, or existing Org?

- a. If existing, do you have EDA installed?
- b. How long have you been using EDA?

**ANSWER:** The answer will greatly depend on the solutions offered.

## **EVALUATION**

52. Regarding Section 2.1.2.4 General, Implementation, Training, Support and Reporting, which indicates the committee will use a consensus approach to evaluation and scoring - would it be possible to obtain any more information on preferences or requirements?

**ANSWER:** Details regarding the evaluation and award process are outlined in RFP Section 2.0

53. Appendix E states "any exceptions may result in the disqualification of your proposal, lack of providing the required response or indicating terms will be negotiated post award will result in a zero (0) score for the Master Agreement evaluation criteria in Section 2.1.1." Which of the items 1.1 through 1.12, if a vendor documents an exception with notes, would result in a zero (0) score for evaluation?

**ANSWER:** Details regarding the evaluation of Appendix E are outlined in RFP Section 2.0

54. If a vendor has an existing relationship with the System with an active, negotiated contract/T&Cs, can those either 1) be used as the basis of the final contract (if awarded) or 2) indicative of scoring the full points in the "Contract for Services" section of the scoring table?

**ANSWER:** Appendix E will be evaluated based on the Respondents response to Appendix E only.

55. Do you have established criteria for a lead scoring and grading model? How many scoring/grading models will you require?

**ANSWER:** Details regarding the evaluation and award process are outlined in RFP Section 2.0

56. Is lead and prospect scoring criteria and engagement measurement currently leveraged for recruiting and admissions? Please explain the desired or preferred approach for measurement. Are scores weighted in any way?

**ANSWER:** Details regarding the evaluation and award process are outlined in RFP Section 2.0

## **COSTS/FUNDING**

57. Please confirm if this cost should include the cost for licensing as well as cost for providing end user/ system support for the implemented application?  
**ANSWER:** Please review instructions in Appendix C. The University needs to understand the Total Cost of Ownership for the solution offered.
58. Appendix C states "Respondents' are encouraged to provide additional price incentives for providing an enterprise solution, multi-year or award of multiple institutions." Can the system please clarify if there is a potential interest/option to award to single/individual campuses vs one singular award for the System?  
**ANSWER:** In Appendix C we need individual campus pricing and enterprise pricing. The decision to move forward will be based on need and ability to support the solution in their budget.
59. Can you please elaborate the scope of "Growth and Enhancements"? Also, do you plan to get this phase started immediately after the production launch of the new system?  
**ANSWER:** Growth and Enhancements are meant as options for the University's consideration and should not be included in Appendix C anywhere other than in the Growth and Enhancement tab.
60. What is the System's budget for the project?  
**ANSWER:** We are not able to provide this information.
61. Has a budget been allocated and approved for this project?  
**ANSWER:** The answer will greatly depend on the solutions offered.
62. Which System department is funding this project?  
**ANSWER:** The answer will greatly depend on the solutions offered.
63. Given the current COVID-19 situation, is funding secured for the project, or is there the possibility of funding being reprioritized to other initiatives?  
**ANSWER:** The answer will greatly depend on the solutions offered and the cost of the solution, however for those campuses currently using a solution one needs to be in place.
64. Please confirm if this is the cost to train the end users on the usage of the new system. Will the training be limited to super users on Train-the-Trainer model? What is the tentative user count you are expecting to be trained?  
**ANSWER:** Depends on cost and available training options.
65. Will all institutions within the system choose the same new CRM solution or will each institution have the autonomy to make its own decision regarding the new system?  
**ANSWER:** The answer will greatly depend on the solutions offered and pricing.

## **MARKETING**

66. What email automation/marketing platform are you currently using? When does your license expire?  
**ANSWER:** Refer to Addendum 1 Questions 1 and 3.
67. Question 14 of the Solutions Requirements Matrix asks about integrations with other CRMs and marketing tools; which other CRM/marketing systems is the System interested in integrating with the new CRM?  
**ANSWER:** Refer to question 1 above and RFP Appendix H General Requirements Questions, Item 4.
68. SCOPE OF WORK 14. "Provides ability to integrate with other CRM's and marketing tools" - What tools and other CRMs do you have and want to integrate with; and for what purpose? Please provide scope definition.  
**ANSWER:** Refer to question 1 above and RFP Appendix H General Requirements Questions, Item 4. Integrations are generally to extend communication tools or tracking/reporting capabilities.

69. Does the solution or system need to be integrated with specific UMS or campus systems? Please provide additional detail on any systems not currently integrated that should be in-scope for data flow to support CRM and marketing processes or communications

**ANSWER:** Refer to question 1 above and RFP Appendix H General Requirements Questions, Item 4. Integrations are generally to extend communication tools or tracking/reporting capabilities.

70. What marketing tools are currently used by the System?

**ANSWER:** EMMA, Target-X Solution, Marketing Cloud, Campaign Monitor

71. How do you currently segment your marketing lists? (Example, by program of interest, by degree of interest, etc.)

**ANSWER:** Student stage, application status, program of interest, event attendance, grade level, student type, location, territory manager, engagement, high school, athletics, veteran status, demographic, etc.

72. How many data sources would feed into your Marketing platform? Please list each source, if possible.

**ANSWER:** The answer will greatly depend on the solutions offered.

73. How does your marketing/lead data get into your current Marketing platform? Are there direct integrations or manual data loads? Are you looking to keep this strategy in place, or improve upon it.

**ANSWER:** Refer to question 1 above and RFP Appendix H General Requirements Questions, Item 4.

74. What application/ system does the university use today to manage admissions and marketing? Do you plan to decommission that system completely?

**ANSWER:** The University of Maine System uses Peoplesoft Campus Solutions as their SIS, Salesforce & TargetX as their CMS, and Perceptive Content as their Document Imaging System. The SIS and Document Imaging System will remain in place, the CRM may be changed or discontinued on a per campus basis.

75. How many total operating or business units would be required if each unit requests to manage marketing operations independently from others?

**ANSWER:** Depends on the campus business practice and will greatly depend on the solutions offered.

76. What types of print (physical mailing) communications need support?

**ANSWER:** Prospective student marketing (postcards,brochures) , Admission Communications/letters

77. Will UMS include legacy CRM data experts within the joint project team to test and validate CRM data and ensure marketing segmentation and automation requirements are met for its new marketing users? Please explain further.

**ANSWER:** Yes. The admins of the current CRM will be directly involved in the implementation of the new CRM.

78. In the RFP document, you list 7 campuses (Univ of Maine, Augusta, Farmington, Fort Kent, Machias, Presque Isle, Southern Maine) and 2 specialty schools (School of Law, Graduate and Professional Center). Can you provide the current Salesforce landscape for these 9 areas? What campuses are using TargetX? What campuses are currently sharing a Salesforce org? What campuses are using Marketing Cloud? For the campuses using Marketing Cloud, is it one instance with multiple business units or multiple instances?

**ANSWER:**

Campus	Tool
UM & UMM	TargetX
UM Graduate School	TargetX
UMA	TargetX
UMF	TargetX
UMF Graduate School	Shared Salesforce / Marketing Cloud One Business Unit



UMFK	Shared Salesforce / Marketing Cloud One Business Unit
UMPI	Shared Salesforce / Marketing Cloud One Business Unit
USM	TargetX

79. What CRM system(s) is the University of Maine System currently using? If this varies between the different institutions, please specify.

**ANSWER:** Refer to Addendum 1 Question 80

80. What systems are in place now at the campuses for the CRM, Marketing and Events?

**ANSWER:** Refer to Addendum 1 Question 80

81. Do you plan to procure one new Marketing Cloud instance or use an existing instance?

**ANSWER:** It depends on the solution provided. UMS does currently have two instances of Marketing Cloud.

82. Will CRM and Marketing Cloud Administration be centralized in one location with delegated administrators at each other location?

**ANSWER:** Will greatly depend on the solutions offered.

## **EVENTS**

83. Which events management tools are used by the undergrad and graduate admissions teams? Is there a preferred tool that Maine would like to leverage?

**ANSWER:** Refer to Addendum 1 Questions 1 and 3.

84. Which event management tool(s) are used by the undergrad and graduate admissions teams?

**ANSWER:** TargetX Events, Visit Days, Zoom

85. Is there a preferred events management tool that Maine would like to leverage re?

**ANSWER:** No

86. Please explain for each campus or unit any unique or desired Events Management functional requirements.

**ANSWER:** Please refer to the requirements

## **SOLUTIONS REQUIREMENTS MATRIX**

87. For the functional items in the Solutions Requirement Matrix, will the System be deploying all functional areas for all institutions/campuses using the CRM? What variation in processes/configuration, if any, are expected and/or known.

**ANSWER:** This will depend greatly on the solutions proposed. Application module may not be required at all campuses.

88. Please provide additional information for line item #126 in Appendix H2 – Solution Requirements Matrix; Ability to send emails to form filler or other email.

**ANSWER:** Provide information on the solutions capability to send a copy of form responses to one or more email addresses.

89. SCOPE OF WORK 1. "Provides the ability to manually and/or automatically purge and/or archive student records based upon business rules and policies of the University." - Should the purging/ archival be done in an external database?

**ANSWER:** No

90. SCOPE OF WORK 13. "Provides name and contact information for constituents"- What do you refer as Constituents here?  
**ANSWER:** Students, Parents, Coaches, School Counselors Other "Influencers"/contacts in the Admissions process.
91. SCOPE OF WORK 68. "Provides ability to do Google Analytics integration" - Please confirm that Google Analytics is already used by the University and vendor's scope of work is limited to integrating it with the new system.  
**ANSWER:** This request is for existing Google Analytics configurations, and may differ by campus.

### **IMPLEMENTATION**

92. What role do you expect the UMS team to have in this project and are there any tasks we should plan on UMS owning?  
**ANSWER:** Dependent on functionality provided in the solution offered and needs of the stakeholders.
93. When does the System anticipate to begin project implementation?  
**ANSWER:** This answer greatly depends on the Respondents' answers to Appendix H.
94. Appendix H asks about implementations being fast tracked. What does the System have in mind for this?  
**ANSWER:** The Respondent needs to answer based on their knowledge of their solution and what is required to implement the solution. What is your quickest implementation possible, when providing the response you should provide an estimate on the demands of the University's staff time?
95. When does the System anticipate to go live with the new CRM?  
**ANSWER:** The Respondent needs to answer based on their knowledge of their solution and what is required to implement the solution.
96. Are there any preferred go-live dates or key timeline considerations of which we should be aware?  
**ANSWER:** The Respondent needs to answer based on their knowledge of their solution and what is required to implement the solution.
97. Are you expecting to phase in the solution across the campuses and what do you see as the ideal time-frame based on existing licenses and academic calendar.  
**ANSWER:** Dependent on functionality provided in the solution offered and needs of the stakeholders.
98. Is there a phasing plan for the project to cover different universities/departments and aspects of the solution? If so, can this please be shared?  
**ANSWER:** Depends on the solution provided, demands on staffing, timeline, etc. There is not currently a plan for any expansion to other departments.
99. What impact does the System anticipate on vendor/solution selection and/or implementation given the COVID-19 situation?  
**ANSWER:** Unknown.
100. Is there a requirement for the vendor to attend in-person for some of the implementation meetings/workshops?  
**ANSWER:** Dependent on vendor's ability to support successful implementation and planning remotely.
101. Does the System require vendors to provide a managed implementation service (including project managers, implementation staff, etc) vs DIY solutions?

**ANSWER:** Please refer to RFP Appendix H

102. What System staff have been/will be assigned to the project for implementation?

**ANSWER:** RFP Appendix H requests that the Respondent provide information on the required staffing levels, etc.

103. How will the implementation be phased?

**ANSWER:** The Respondent needs to answer based on their knowledge of their solution and what is required to implement the solution.

104. What is the preferred method to cover implementation of different departments, colleges, campuses, and aspects of the solution? Is there a desire for phasing or a coordinated cutover? Please explain further.

**ANSWER:** This will depend on the solution provided

105. Please explain the desired strategic communication goals stemming from this implementation. Example: Increase admission rates by XX% within the first academic year following go-live.

**ANSWER:** We do not currently have any goals defined.

106. Does the University of Maine System have a preferred or prioritized order of implementation by campus? Are there any preferred go-live dates or key timeline considerations we should be aware of?

**ANSWER:** Depends on the solution provided, demands on staffing, timeline, etc. Be prepared to provide information on how your solution could be implemented simultaneously across multiple campuses if necessary.

107. Does School or Inquiry Scoring already have defined criteria at UMS or will this need to be developed during the implementation?

**ANSWER:** This may differ by campus.

108. Has a budget been allocated for this project, and if so can you share the amounts budgeted for product and implementation services?

**ANSWER:** We cannot share this information.

109. How many program offerings will this implementation support?

**ANSWER:** We offer 100+ degrees and certificates across different campuses.

110. Does the university accept vendor's resources (team involved in the implementation) to be present at a combination of onsite and offshore (outside the US) locations? Also, please confirm the onsite location where onsite resources will operate from.

**ANSWER:** Dependent on vendor's ability to support successful implementation and planning remotely.

111. Which institutions (campuses) are a priority for the implementation?

**ANSWER:** Depends on the solution provided, demands on staffing, timeline, etc. Be prepared to provide information on how your solution could be implemented simultaneously across multiple campuses if necessary.

## **CONFIGURATION**

112. Is this one instance for the 6 universities or 1 tenant with 6 instances?

**ANSWER:** We are looking for both possibilities. In the event pricing is different for options noted please separate that pricing and distinguish the option in RFP Appendix C Exhibit 1.

113. Would the University of Maine System be open to deploying a single instance of the CRM for all institutions if the vendor could support each campus's unique complexities within one environment and if this would reduce cost? Or, is it required that each campus have a completely separate instance of the CRM?

**ANSWER:** We are open to the possibility of deploying a single instance. In the event pricing is different for options noted please separate that pricing and distinguish the option in RFP Appendix C Exhibit 1.

### **SMS COMMUNICATIONS**

114.Regarding the Rider A Specifications, row 43 SMS Communications Ability to use call forwarding - Are you asking if the system can take an inbound SMS from A and route it to B?

**ANSWER:** No, we were referring to an actual phone call not texting.

115.Does the University of Maine System have a text messaging tool that is currently being utilized? If so, do you want to continue using this tool with the new system or would you prefer a new tool for text communication with the new system?

**ANSWER:** Refer to Addendum 1 Question 3. Open to both possibilities of new tool or staying with current system.

116.What is the largest email send you will be sending? (We are looking an estimate number for the largest list size of leads/contacts that would receive one single email from you... i.e. is this 1,000 or 100,000)

**ANSWER:** UMaine has sent emails of around 200k, not including parents, otherwise most campuses are in the range of 30,000 – 50,000.

117.Requirement 42 describes integration with multiple SMS platforms. Could you please indicate which platforms are currently being used and which you would like to retain/integrate with and their respective use cases?

**ANSWER** Refer to Addendum 1 Question 3.

118.What SMS platform(s) and tool(s) are currently used across the system?

**ANSWER:** SignalVine, Mongoose Cadence, SMS Magic

119.Is there a preferred, enterprise-wide SMS tool?

**ANSWER:** Refer to Addendum 1 Question 3.

120.Please describe the ideal workflow related to item 40 in SMS Communications "Ability to respond to incoming messages from email".

**ANSWER:** We would like the option of having alerts for incoming messages to go to the owner's email and the option for the owner to reply via email to the text (and have it send a text, not an email)

121.Please describe functionality needed as it relates to SMS Call Forwarding (item 43).

**ANSWER:** We would like the option of having the number used for texting forwarded to a front desk number in case someone calls the texting number instead of texting.

122.What SMS platforms and tools are currently used across the system? Is there a preferred, enterprise-wide SMS tool?

**ANSWER:** Refer to Addendum 1 Question 3.

### **EMAIL**

123.Is there a preference/requirement for solutions that offer unlimited email sending without per-contact/message costs?

**ANSWER:** Yes

### **PEOPLESOFT**

124.Regarding integration with PeopleSoft, are all institutions using a single instance of PeopleSoft or does each institution have its own SIS?

**ANSWER:** We are using a single instance of PeopleSoft.

125.Is there a single Peoplesoft (MaineStreet) instance for UMS or separate for each campus?

**ANSWER:** We are using a single instance of PeopleSoft.

126.Is there a central instance of PeopleSoft that the new system will be integrated with, or will there be an integration required for each campus?

**ANSWER:** We are using a single instance of PeopleSoft.

127.Will your PeopleSoft (MaineStreet)system manager be available to build queries from PeopleSoft to be used in the integration to Salesforce?

**ANSWER:** UMS PeopleSoft solutions analysts will be available to provide data integration with the solution selected.

128.Are there any other system integration needs other than PeopleSoft (MaineStreet)? If so, please list the systems and the types of data that need to be integrated.

**ANSWER:** Refer to Addendum 1 Questions 1-3.

129.Do you want the PeopleSoft (MaineStreet) integration to integrate directly through PeopleSoft (MaineStreet) API, or through export and import of csv files?

**ANSWER:** Respondent's should provide details on the integration with PeopleSoft through API and data files.

130.Will all university applications originate in Salesforce? Will any applications originate from PeopleSoft (MaineStreet)? Are you using any other third party applications (i.e. Common App, etc)?

**ANSWER:** Applications can originate from a variety of solutions including third-party applications. Respondents should be prepared to discuss how the solution will integrate with all application types.

## **SOCIAL MEDIA**

131.SCOPE OF WORK 34. "Provides ability to integrate, monitor, track and report on social media interactions with varied constituents and social media networks". - Which social media networks do you use?

**ANSWER:** Facebook, Instagram, Twitter.

132.Do you currently conduct paid digital advertising through platforms such as Google AdWords, Facebook, LinkedIn, Twitter, Instagram, etc? Please specify for each Campus if possible.

**ANSWER:** Yes – Facebook, Instagram, Google (UMA at Institutional Level), Spotify

133.How does the team currently make use of social media platforms (publishing, 1:1 engagement with constituents, etc.)? Please specify for each Campus if possible.

**ANSWER:** Facebook, Twitter, Instagram, LinkedIn, TikTok

## **RELATED TOOLS**

134.Which tool(s) do you utilize to monitor and analyze website analytics (e.g. Google Analytics, Adobe Analytics)?

**ANSWER:** Google Analytics

135.What form creation tool(s) are currently used? How many templates should we anticipate building versus enabling existing forms?

**ANSWER:** FormAssembly, FormTitan

## **ADMISSIONS**

136. What structure and mechanisms are in place to ensure Admissions Teams at individual institutions adhere to the UMS brand standards with their communications (email, mobile, etc.)?

**ANSWER:** Campus specific branding catalogs

137. Are your admissions teams Centralized, or does each campus have separate admissions teams that will access the system?

a. How many admissions teams will be using this system on initial launch? How many admissions teams will be using the system in the ideal future state?

**ANSWER:** Each campus has their own admissions teams that will access the system. Initial launch may not include initial involvement from all campus admissions team, they may need to be phased in based on availability of resources, program needs, etc.

138. Will your admissions committees/application decision makers have a system license, or will they do their review/decision outside of this system?

**ANSWER:** The answer will greatly depend on the solutions offered and the different campuses.

139. How many admission deadlines do you have per year?

**ANSWER:** Dependent by campus and program.

140. If you are rolling admissions, are your applicants still given deadlines?

**ANSWER:** Yes, typically there are deadlines, however there are some programs that allow rolling admissions.

141. Do your applicant reviewers need document markup capabilities?

**ANSWER:** No need to markup on the document provided, campuses use additional forms or annotations in the document repository. We would be open to discussion regarding these capabilities.

142. Please describe how your prospects and applications are assigned/owned in the system?

**ANSWER:** Student stage, application status, program of interest, event attendance, grade level, student type, location, territory manager, engagement, high school, athletics, veteran status, demographic, EPS Code, county, international

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

**ANSWER:** Depends on campus and department needs.

144. How many application types are needed? Please list out each application type (e.g. Undergraduate, Transfer, Graduate, Post-Bacc, Continuing Ed, Other)

**ANSWER:** The answer will greatly depend on the solutions offered

145. Do all of your programs follow a single academic calendar? If no, how many academic calendars do you have?

**ANSWER:** Academic calendar for general undergraduate programs are the same, however we have other calendars to support programs needing increased timeframes

146. If available, please list your current lifecycle stages from prospect to enrollment stage. (These may be current Status and/or Substatus field values)

**ANSWER:**

Prospect  
Inquiry

In Progress  
Application submitted  
Incomplete  
Complete  
Admitted  
Confirmed  
Enrolled  
Denied  
Withdrawn  
Deferred  
Wait List  
Conditional  
Hold

147. Does 'Student Lifecycle Functionality' extend to systems of engagement for UMS alumni?

**ANSWER:** Yes

148. Does the scope of 'Student Lifecycle Functionality' in this RFP extend to systems of engagement for UMS alumni?

**ANSWER:** Possibly. It depends on the solution provided.

149. It is mentioned that "The University of Maine System encourages vendors to specify any additional student lifecycle functionalities beyond the stated requirements". Student lifecycle is very vast and includes multiple modules (like student onboarding, grants management, etc.). Do you have any particular requirements which you plan to get implemented or you prefer to let vendors list down all possible options from their experience?

**ANSWER:** Functions to communicate with students beyond the Admissions Stage of the lifecycle, which may include advising, enrollment, retention, and alumni phases of the student experience.

150. For the online application aspect of the CRM, is the System interested in having separate, unique applications for each institution/department, or is the System interested in a unified application experience where students can use one single interface to apply for one or multiple applications across the entire system (including or excluding graduate-specific programs)?

**ANSWER:** The University already has a system-wide application. Currently, the UMaine and UMF Graduate Schools are looking to have their own separate, unique application.

151. Are official decision letters physical, electronic, or both?

**ANSWER:** Both

152. Please describe existing or planned strategic communication plans for constituents who show interest in more than one campus

**ANSWER:** Currently communication plans are designed and implemented at each campus. There is no consideration as to whether a student has inquired at more than one campus.

153. What is the subscription and/or preference center functionality desired by campuses or units for constituents?

**ANSWER:** We would want constituents to be able to unsubscribe on a per-campus basis, not globally from all campuses.

## **REPORTING**

154. SCOPE OF WORK 136. "Reporting": Does the University have an existing Reporting tool like Power BI or any other tool?

**ANSWER:** Campuses (and the system) may be using PowerBI, Tableau, Salesforce Reports, Apsona or other tools at the moment.

155. What types of mailing communications need support? Do we need to interface/integrate w/ direct mail provider/mail house?

**ANSWER:** Refer to Addendum 1 Question 3.

### **SLA**

156. SCOPE OF WORK 11. "Provides a direct ticketing support mechanism (including third party vendors)" - Does this requirement mean providing a support portal where students/ vendors can raise tickets which are supposed to be responded by your faculty/ staff within defined SLAs? Or does this refer to application maintenance & support to be provided by the vendor after production launch?

**ANSWER:** No, this is meant to mean where the vendor partners with third parties, we are interested in making sure we can request support to those third parties and have an articulated SLA.

### **TECHNICAL**

157. What do you use for SSO?

**ANSWER:** See RFP Appendix K (General Technical, Question 14)

158. Do you have specific data security protocol, i.e. application event monitoring?

**ANSWER:** See RFP Appendix K (General Technical, Question 14)

159. SCOPE OF WORK 9. Provides SSO integration" - How is Single Sign On implemented on existing systems? Are your users migrated to Office 365/ Azure active directory?

**ANSWER:** See RFP Appendix K (General Technical, Question 14)

160. Is there a current Identity and Authentication Management (IAM / SSO) solution in place for students? If so what authentication protocols are supported?

**ANSWER:** Yes – MaineStreet (peoplesoft) credentials  
See RFP Appendix K (General Technical, Question 14)

161. Do you have current processes/infrastructure in place to meet CAN-SPAM, CASL, GDPR compliance?

**ANSWER:** Yes

162. Do you currently use a document management system, like DocuSign?

**ANSWER:** No

163. SCOPE OF WORK 23. "Provides integration with our SIS and other external sources"- Does the university use PeopleSoft currently to store enrolled students' information? Can you please explain more about the need for this 2-way integration? What are the other external sources with which integration is needed?

**ANSWER:** Yes. Ability to synchronize information about a student's contact/bio demo information to and from our SIS, as well as admissions application and enrollment information. We are interested in the general ability to integrate with other data sources, and what methods are available. (Batch files, direct integration, API's, etc...)

164. How is the System currently integrating between the CRM/online application and the SIS?

**ANSWER:** ETL Data Files, SFTP

165. Do you currently use an environment management tool?

**ANSWER:** No



## **IMPORTS**

166. Do you need assistance building imports for third party list buys or score reports? Please list all third party lists. (i.e. College Board Search, SAT Search, SAT Scores, ACT Search, ACT Scores, TOEFL, GRE, GMAT, etc.)

**ANSWER:** This will depend on the respondent's solution. Lists include:

- College Board Search
- SAT Search and SAT Scores
- ACT
- TOEFL/IELTS/PTE Academic Search and Scores
- GRE Search and Scores
- GMAT Search and Scores

## **DATA MIGRATION**

167. Do you have existing data or documents to be migrated to the new system? If yes, where is it residing and what is the volume of data to be migrated?

**ANSWER:** Yes, Historical inquiry/applicant information resides in our current CRM environments.

168. Does the University have an existing document storage tool like SharePoint? If no, is there a requirement to have one for storing the documents?

**ANSWER:** Yes, SharePoint, Perceptive Content. We may additionally be interested in storing documents in the CRM if needed or appropriate per the vendor.

169. What data (including tables and record counts) will need to be migrated from the legacy CRM systems to the new CRM?

**ANSWER:** The data tables and record counts may differ by campus.

170. What staff and resources does the System 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)?

**ANSWER:** Admins for current CRM will be directly involved in the data integration.

171. Does data need to be migrated from the previously used CRMs/Salesforce orgs/TargetX? If yes, how many CRMs/Salesforce orgs/TargetX AND approximately how many tables from each instance? What is approximate volume of data to be migrated?

**ANSWER:** This will depend on the solution selected.