

**REQUEST FOR PROPOSALS #2021-012
Customer Relationship Management Solution
RESPONSE ADDENDUM # 2
January 22, 2021**

CLARIFICATIONS

1. RFP Section 1.3.1 – Response to Written Questions
 - a. This Addendum 2 is the part 2 of the submission. All data points will be reviewed and provided with the next and final submission.
 - b. Remaining responses will be available by end of day February 3, 2021.
2. Deadline for Proposal Submission is modified to **February 19, 2021 by 11:59 p.m. EST**

QUESTIONS

1. Does UMS offer a mobile application for students to download to facilitate interactions with the institution? Please specify per campus.

ANSWER:

Campus	Tool
UM & UMM	Navigate
UM Graduate	None
UMA	Navigate
UMF	Navigate
UMF Graduate	None
UMFK	None
UMPI	None
USM	Navigate

2. What are the fees assessed by the System or its universities for event attendance, application submission, and/or enrollment deposits? Please break down by university and/or program (e.g. undergraduate vs graduate).

ANSWER: We do not charge for event attendance. No charge for application submission for undergraduate. Graduate application fees dependent on program.

UMaine Undergrad Deposit: \$50

UMaine Grad Deposit: \$65 application fee [degree/readmit], \$35 application fee [certificate/nondegree], No deposit

UMM Deposit: \$50

USM Deposit: \$50 undergrad, varies graduate

UMPI Deposit: \$50

UMA Deposit: No fee

UMF Deposit: \$50 undergrad, \$0 graduate

UMFK Deposit: \$50

SALESFORCE

3. Can you describe the types of events you would like Salesforce to track? (i.e. Open Houses, Tours, 1:1 meetings, etc.) Are these ticketed events?

ANSWER: Open Houses, Campus Tours, Accepted Student Days, Faculty Led Tours, 1:1 Meetings, New Student Orientation, Guidance Counselor Events, Off-Campus Student Receptions, Virtual Events, School Tours, High School/College Visits, Career Fair Events, Business and/or Chamber of Commerce Events.

There are no ticketing events that charge fees for tickets. However, we do need to cap registration and handle wait lists for events.

COSTS/FUNDING

4. It is mentioned that "Respondents' are required to provide separate costs for each institution." The new system will have same functionalities across all institutions but every institution will have access to their own data. Please confirm if our understanding is correct? If yes, we plan to implement the new system for all the institutions on a single instance thereby providing a consolidated cost. Kindly confirm if this understanding is correct.

ANSWER: The structure of the CRM will depend on the solution provided.

The ability to implement a system wide solution will be dependent on the total cost of ownership identified in Appendix C. Respondent should provide costs for system wide solution (one instance) and campus specific pricing (individual campus instance).

Respondent should also consider outlining cost savings for two or more campuses sharing an instance.

MARKETING

5. SCOPE OF WORK 80. "Provides online form allowing participants to register online." & 122 "Provides ability for person to complete inquiry form online by institution/career". -There are other similar requirements where an online page needs to be hosted for marketing or admissions. Does the university want to host these online pages on their own website? If yes, please confirm the technology on which it is built. If no, our understanding is that the vendor will provide a public facing portal to host these pages.

ANSWER: There may be a preference to host or integrate on our own sites, and these are presently hosted via Drupal or Wordpress. This may not be required for all forms or events.

6. What is/are the current marketing automation solutions serving the following communications channels: email, mobile/SMS/text, social media, telephone, ground mail? Please specify for each Campus if possible.

ANSWER:

Campus	Tool	Solution Name
UMA	Email	EMMA (campus wide), TargetX
	SMS	Signal Vine
	Social Media	Sendible
UM Grad	Email	TargetX
	Social Media	HootSuite
UMPI/UMFK/ UMF Grad	Email	Marketing Cloud
	SMS	360SMS
	Social Media	Facebook, Instagram, Tiktok
UMaine/UMM	Email	TargetX
	SMS	Signal Vine
	Social Media	Facebook, Instagram, Snapchat, YouTube
UMM	SMS	SMS Magic
	Social Media	Facebook, Instagram, Twitter, YouTube
USM	Email	Marketing Cloud, TargetX

USM	SMS	Mongoose, AdmitHub
UMF	Email	TargetX
UMF	SMS	Mongoose, Targetx/Salesforce (automation)
UMF	Ground mail	TargetX

7. Which tool(s) are you using to measure the efficacy of your marketing campaign efforts? For instance, how do you measure Return On Investment (ROI) by communication channel? Similarly, how do you measure the influence of marketing activity on conversion through the enrollment funnel?

ANSWER: Each marketing tool has ways to measure efficacy of the specific campaign, ROI will depend on campus, platform, and marketing effort goals.

EVENTS

8. How are virtual events included in the recruitment process currently? What is the future state vision for virtual events?

ANSWER: Visit Days, Zoom

9. To what extent is content from past events shared or archived for on demand viewing?

ANSWER: Each campus varies, but usage of the data from the last 3 years is common.

SMS COMMUNICATIONS

10. SMS Comms: please provide an idea of how many SMS message could be sent in a single 'bulk' send?

ANSWER: UMaine will often send a bulk that's between 5,000 – 10,000 (this is our maximum need)

PEOPLESOFT

11. Regarding integration with PeopleSoft, does the University of Maine System want the vendor to perform the integration or just that integration is possible/supported?

ANSWER: Integration is possible/supported

12. 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: See responses to Refer to Addendum 1 Questions 1-3.

13. What type of data needs to be integrated from PeopleSoft (MaineStreet) to Salesforce? List data types. What types of data need to be integrated from Salesforce to PeopleSoft (MaineStreet) - list data types.

ANSWER: Refer to RFP Appendix H2.

SOCIAL MEDIA

14. How many social handles are managed from a publishing or engagement perspective today (Ex: 5 Facebook handles would equate to 5)? Please specify for each Campus if possible

ANSWER:

Campus	
UM	5 (adm)

UMM	3
UM Graduate	4 (adm)
UMA	5 (campus) 0 (adm)
UMF	1
UMF Graduate	1
UMFK	1
UMPI	1
USM	3

15. Do you currently conduct social listening queries to understand what is being “said” to your social handles or about any of your institutions? Please specify for each Campus if possible

ANSWER: No

ADMISSIONS

16. Do you ever enter leads into your database that may not have explicitly requested information about your school or its programs (i.e. list purchases, names from test sites, etc.)? If yes, what does that volume look like (i.e. hundreds of names or thousands)?

ANSWER: Some campuses obtain names and range annually (50,000 – 200,000) (CollegeBoard, Niche, Hobsons, NRCCUA, ETS)

17. Do you allow multiple applications per admit period?

ANSWER: The UMaine, USM, and UMF Graduate Schools allow for multiple applications to be submitted in a given term. Undergraduate offices only accept one application per term per campus.

18. Do you allow deferrals, and if so how do you currently manage deferrals?

ANSWER: Undergrad allows deferral after the student has confirmed.

UMaine Graduate School allows for deferrals at any point during the applicant stage and are handled on a case-by-case basis.

UMF Graduate School does not allow deferrals. They request students reapply for the future term.

19. Do you accept transfer credit in the admission process? Do you give experiential credit? If yes, please describe relevant processes.

ANSWER: Allow for transfer credits during the admission process but does not allow for experiential credit to be transferred into a program.

20. Do you track legacy information (i.e. relationship to alumni)?

ANSWER: Yes

21. Do you need to communicate with a parent about their child’s application?

ANSWER: Yes, at the undergraduate level.

22. Do you recruit athletes, and if so how do you identify athletes in your current system? Do you use an external database for athlete management?

ANSWER: Use identified activities to identify possible athletes. FrontRush is used at a majority of campuses.

23. Do you require letters of recommendation, and if so how are they currently acquired?
ANSWER: Some undergrad campuses do. If required, they must come directly from the recommender or through the applicant's high school.

Depending on the program, the UMaine Graduate School may require letters of recommendation (up to 3 in most programs) that are submitted through the application portal by the reference.

The UMF Grad School requires recommendation letters or forms depending on program. They must come from the recommender.

24. Do you send paper or electronic decision letters?
ANSWER: It depends on the campus and the program accepted into.
25. Please describe how you communicate application status to an applicant? For this purpose, do you send emails manually, or automated? What details about the individual's application do you include in the body of this email?
ANSWER: Each campus gives the student a link to a student portal (either PeopleSoft or TargetX), which has the status of a student's application. After that, content and system used varies by campus.

26. How does an applicant accept or decline their admission? Is there a formal process and financial deposit?
ANSWER: It varies by campus. Some campuses require a form, something in writing, while others just require payment. See Addendum 2, question 2 for deposit information.

27. Describe the supplemental materials required for your application - are you managing a lot of paper documents, and do you envision those moving to electronic documents?
ANSWER: Undergraduate Admissions receive high school and college transcripts, essays, recommendation letters, portfolios. These are managed electronically in Perceptive Content.

UMaine Graduate School allows applicants to upload unofficial transcripts/test scores, essay, resume, and additional materials within the application portal. Official transcripts and test scores are processed through Perceptive Content and manually added to the application portal for departmental review.

UMF Graduate School allows applicants to upload unofficial transcripts/test scores, essay, resume, and additional materials online. Official transcripts and test scores are handled manually and shared with review committees for departmental review.

28. Do you require SAT/ACT/GRE/MCAT or other test scores? Are you test optional?
ANSWER: All undergrad admissions are currently test optional, but we still accept test scores.

Depending on program, applicants to the UMaine Graduate School may be required to submit GRE scores. All international applicants who did not receive degree from English speaking university or non-native English speakers are required to submit TOEFL/IELTS.

UMF Grad does not require test scores.

29. Is there any supplemental exam process required as part of your application process? Or, any special petition processes that occur during the application process?
ANSWER: Not for most undergrad programs, however, Accuplacer is occasionally used.

A few graduate programs at UMaine require an audition or portfolio submission.

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

When the student has signed up for classes they are considered enrolled. Official headcount is taken at a census date partway into the term.

STUDENT ADVISING

31. What is the student advising model that is used at UMS (professional advising, academic advising, etc.) Please specify per campus?

ANSWER: UMA - (Professional and Academic – each student is assigned a professional and academic advisor)
UMaine – Academic Advising
UMF Undergrad – Academic Advising
UM Grad – academic advising, online learner support advising, student support advising
UMPI - Academic
UMFK - Academic
UMF Grad – Academic
USM – Professional and Academic Advising based on # of credits and programs, and career advising

MAILING

32. Is there a requirement to interface with and / or integrate with a direct mailing provider?

ANSWER: No

TECHNICAL

33. If applicable, list systems that you wish to integrate with Salesforce now or in the future. Please indicate which systems must be integrated during this phase of the project.

ANSWER: Please see RFP Addendum 1 Question

34. Do you have an integration architecture/strategy in place currently?

ANSWER: Integration is handled by each campus and varies with each system being integrated

35. What integration platform/middleware do you have?

ANSWER: Informatica, dataloader

36. What are the existing integration processes in place?

- Preferably with a data flow diagram or an integration architecture diagram
- If not, what are the source/target systems and frequency of integration
- Do you have a current data dictionary or documentation for your SIS?
- Do you have a current data dictionary/documentation for the current application system?

ANSWER: This level of detail we expect to provide to the resulting awardee during the project discovery phase. The information requested is available in some degrees and we would anticipate that the awardee would provide data mapping requirements as part of the discovery process.

37. Do you have data governance policies in place, and can those documents be shared at the start of the project?

ANSWER: This level of detail we expect to provide to the resulting awardee during the project discovery phase.

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

ANSWER: We receive this data from our SIS ETL data integration.

39. Do you plan to integrate with test vendors, such as ACT/SAT

ANSWER: We receive this data from our SIS ETL data integration

40. Data encryption required?

ANSWER: This level of detail we expect to provide to the resulting awardee during the project discovery phase.

41. Do your users share data commonly, or do certain records need to be only visible to certain groups of users? Please describe these data visibility requirements.

ANSWER: There are shared data files used by each campus from the SIS. Within the CRM, visibility needs to be controlled by user level and campus association for some records.

42. Please explain what are the University's existing hardware and software investments?

ANSWER: This level of detail we expect to provide to the resulting awardee during the project discovery phase.

43. Does the University of Maine System have a preferred ETL/iPaaS tool? (i.e. Informatica Cloud, Jitterbit, MuleSoft, etc.)

ANSWER: We are currently using Informatica but do not have a preference. Will depend on solutions presented.

44. Do you currently have a data warehouse to be used for archiving?

ANSWER: One is being developed at the system level.

DATA MIGRATION

45. Do you require data migration as part of this process, and if yes:

How many data sources will be involved in the data migration?

- a. How many source tables will be included in the data migration? (e.g. Contact, Application)
- b. Roughly, how many data points (fields) will be migrated over to the new system for each contact? (Examples of data points include name, email, phone number, program of interest, etc.)
- c. Roughly, how many records will be involved in the data migration? And/or what timeframe of data will we be migrating (1 year back, 2 years back, etc.)?

ANSWER: This level of detail we expect to provide to the resulting awardee during the project discovery phase.