

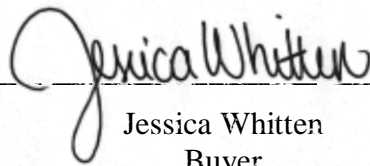


THE UNIVERSITY OF SOUTHERN MISSISSIPPI

March 25, 2021

ADDENDUM 2 TO RFP 21-52

This addendum provides answers to questions submitted by prospective bidders. The University's answers are shown in **RED**.


Jessica Whitten
Buyer

1. Can you advise the number of users who will need access to the system?

Grad faculty reviewers/approvers – 400
All other users – 90

2. Can you share the budget allocated for this project for licenses and implementation?

No. The bid will be awarded to the vendor that is scored as 'lowest and best' per the RFP document.

3. What are the motivations to leave the current system?

State required bid process.

4. Is there a need to migrate data from the current system, if so can you provide record counts?

Yes. Online learning has 58,423 contacts, application records, cases, and a contact log,

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Undergraduate has ~325,000 Contacts. ~120,000 Apps. Related cases and correspondence. A contact has ~330 associated fields. Applications have ~180 associated fields.

Grad/International – ~139000 Contacts, 10,000-15,000 apps

5. Is there flexibility to being live on August 1? Given a response due date of 4/14, that seems very aggressive to allow for reviews, interviews, decisions, contracting, planning and implementation.

This is a target date based on the start of the recruiting period. Please provide an implementation plan & schedule as part of the RFP bid.

6. Is USM willing to sign more than one contract as a result of this RFP?

There will be a single contract but can include subcontracting of products/services.

7. Is there a maximum total budget for this project?

No. The bid will be awarded to the vendor that is scored as 'lowest and best' per the RFP document.

8. Is there separate budget for optional requirements as listed?

No, but these optional requirements must be listed separate, itemized based on functionality.

9. Will IHL Board approval be required to finalize contracting? If so, is there a targeted approval month?

IHL approval will most likely be required and the anticipated approval will be the end of June.

10. What is the expected decision date? It is expected that this project will require a minimum of 90 days to complete, and will likely require more time.

The decision will be based on the scoring and expect that within 2 weeks after bid opening. No work can begin until final approval by IHL.

11. Can they award 2 vendors on one piece of paper (e.g., platform and implementation services)?

No, there will be a single contract but can include subcontracting of services.

12. Is billing by completed milestones acceptable?

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Implementation can be billed based on deliverables but any annual software licenses and support cost will be billed annually.

13. Regarding insurance, we maintain a \$2M policy specifically for person and advertising injury versus \$3M requested. Is this acceptable?
Typical coverage is as follows:
1. Workers Compensation: Limits as required by State of Mississippi law
 2. Manufacturer's and Contractor's Liability, other than auto: Bodily injury of \$1,000,000 per occurrence, and \$2,000,000 aggregate; Property damage, per occurrence \$2,000,000; shall extend to complete operations of the contractor
 3. Auto Public Liability: Bodily injury, per person \$1,000,000 per occurrence \$1,000,000; Property Damage, per occurrence \$1,000,000
 4. Successful bidder shall be required to furnish certificates of insurance as evidence of compliance prior to commencing work.
 5. USM must have thirty (30) days' notice of cancellation or change in insurance coverage and give its approval.
14. Given scope of optional requirements, how will other business units be considered in the decision making process as it relates to this RFP?
The scoring committee has been identified to participate.
15. Are the optional requirements part of the decision making criteria?
Per the scoring criteria, there are 5 points allowed for optional requirements.
16. Would USM be willing to allow other IHL institutions to reference this RFP resultant contract to procure product / services provided by winning vendor?
There is language in the RFP documentation for this provision.
17. Do you prefer a SAAS or a self-hosted solution?
SaaS
18. Is August 1st still a hard date for go-live? Please describe your must-haves by August 1st.
This is a target date based on the start of the recruiting period. Please provide an implementation plan & schedule as part of the RFP bid.
19. Please confirm systems/technology that will be replaced (e.g., Campus Management/Anthology Radius, student application portal, etc.).
Campus Management/Anthology Radius, Application Review portal, student application portal.

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20. For all of the required items that include "be able to", are these required in the initial scope or will they be future functionality?
**In Appendix C all items are marked as either 'R' for required or 'O' as optional.
The required functionality must be provided.**
21. Where in the student lifecycle does this scope end (e.g., admit, accept, pay the application fee, enrollment)?
Defined in the RFP & Appendix C.
22. Are alumni/advancement/advising/retention out of scope for this project?
Defined in the RFP & Appendix C.
23. Can you provide a breakdown of staff user roles for the 1,000 total users listed? (i.e. how many application reviewers, recruiters etc.)
**Grad faculty reviewers/approvers - 400
All other users – 90**
24. What is the total number of prospective students annually? Broken down by undergraduate and graduate.
**Grad/international – 10,200
Undergrad/international – 18,140**
25. What is USM's current conversion rate? What is USM's ideal conversion rate?
N/A
26. What technology are you using for student applications, and will this be replaced with a solution under this proposal?
Hosted crm, web portal
27. How many application variations do you currently have?
**Grad/International – 4 per semester plus clones for applicants wanting to apply to multiple programs
One for undergrad international, one for English Language Institute, and international grad has 2, in case an applicant wants to apply to more than one program.
Undergraduate 60-70 iterations**
28. Within the 4 areas (undergraduate, graduate, international and online), how many programs are included? Are there any differences between the applications for these programs?
**Grad/International – 200, yes
Online - 48 separate programs we recruit for, 15 undergrad programs have a single application**

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Undergraduate – No

29. When an application is received, does it create a record in your SIS automatically, or only at some future point (e.g., acceptance, enrollment, etc.)

There is a data exchange process to import data into our SIS, PeopleSoft as well as exporting back to the CRM.

30. What is the total volume of applications received per year? Broken down by undergraduate and graduate.

Grad/international – 10,200

Undergrad/international – 18,140

31. What attachments that are required with an application (.e.g, transcript, resume)?

Undergraduate – 2-4 docs

Grad/International – Official Transcripts, recommendations, test scores, resume, statement of purpose, letter of intent, research interests, writing samples, essay, licensures and certificates, other miscellaneous documents required by a particular program

32. How many people review an application?

Grad faculty reviewers/approvers – 400

For a single graduate application, between 3-15 people are likely reviewing an application and making an admission recommendation

All other users – 90

33. List the types of reviewers (e.g., faculty, alumni, etc.)

Grad faculty reviewers/approvers - 400

All other users – 90

34. Do you always include an application fee?

Grad/international – Yes

Undergraduate – No

35. Does the fee vary by program?

Undergrad/grad varies (\$40/\$60)

Undergraduate – Not usually

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36. Are there fee waiver codes that need to be considered?
Not currently, functionality required to allow.
37. Will Cashnet remain?
Yes.
38. If Cashnet remains, will it process the application fees or will fees be processed outside of Cashnet?
No, Cashnet will process the fees.
39. Do you own a middleware?
No.
40. Please confirm integrations that are required in the RFP scope (e.g., PeopleSoft SIS, Cashnet, Common Application, etc.).
Defined in the RFP & Appendix C.
41. Are you planning to use SSO for staff and students to access the solution?
Yes, Defined in the RFP & Appendix C.
42. What are you using as your identity provider for SSO (e.g., Active Directory, etc.)?
Defined in the RFP & Appendix C.
43. What email system does your staff use?
Office 365, Outlook.
44. Please confirm audiences that will be accesses portals (e.g., student applicants, high school/community college counselors, faculty reviewers)
Student applicants, high school/community college counselors, faculty reviewers, staff.
45. What is the expected functionality for each of the audiences confirmed above?
**Undergraduate – Applicants should be able to apply, pay fees, upload documents, ability to view decision status/letter, ability to respond to admission offers.
Counselors should have ability to upload documents of applicants.
Faculty reviewers – review applications and materials at different stages with limited edit access, review completed applications and enter decision recommendations (multiple faculty members will need to be able enter different recommendations on one application)
Staff – multiple roles and permissions assigned based on role, varying from read only access through full create/edit/delete access. Administrators will need access to create new roles and change assigned role.**

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Graduate/International Student Applicants – ability to review missing application requirements, upload documents, change/edit recommender information.

46. What marketing automation tools(s) do you use today for drip campaigns or email blasts?

The Radius CRM handles emails through communication plans plus using another third-party system for texting.

47. Will current marketing automation tool(s) be replaced in this scope?

Third-party system for texting.

48. What is the number of unique email addresses that you are marketing to at any given point?

Grad/International – 10,000-15,000

Undergraduate - have emailed up to 88,000 in one go. That is usually not the norm. Usually, 12000 or less.

Grad/undergrad int'l - 20,000 (between prospects and applicants)

Online - 6371 emails a day but could sent up to 50,000

49. For this project scope, do you need texting (SMS), chat, bots?

Yes, Defined in the RFP & Appendix C.

50. Describe your requirements for social. Are you listening to create Cases or posting to social media?

Ability to post to social media or respond to social media.

51. Is event management in scope for the initial project?

This is an optional feature, defined in the RFP & Appendix C.

52. What event management platform are you currently using, and is replacement of this solution in scope for this project?

Multiple systems.

53. Which of the following features are required for event management?

This is an optional feature but these items are desired.

Single-Day Events

Free/Paid Events

Basic Ticketing

Check-In Management

Waitlist Management

Reminder Notices

Basic Participant Communication

Website Embed Events

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Multi-Day Registration
Multi-Session Registration
Shift Management
Family/Group Sign-Up
Travel Management
Lodging Management
Meal Planning
Virtual Event Capabilities
Event Manager Portal
Data Migration

54. What data will we need to pre-load, and what system is it coming from?

Radius.

55. Describe the volume and types of records that will be migrated.

Comm Log
Contact Data
Inquiry Data
Application Data
Case Data
Case Messages

Each contact record may have multiple inquiries, cases, case messages, decision, and applications.

All current and future term prospect records, all past and future term applicants and applicant information, all communication plan, target and decision letter data
Undergraduate ~325,000 Contacts. ~120,000 Apps. Related cases and correspondence.

A contact has ~330 associated fields. Applications have ~180 associated fields.

56. Have you identified who will be the system administrators, and how many system administrators do you expect to have?

System administration will be included in the bid response.

57. Will you be contracting for post-implementation support separately, or do you want options to be proposed as part of this bid?

All post implementation system support will be included in the bid response.

58. What CRM system is University of Southern Mississippi currently using?

Campus Management/Anthology Radius.

59. How many total users will be using the new CRM system?

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- Grad faculty reviewers/approvers – 400
All other users – 90
60. How many users will be system administrators?
20 – 50
61. Will some users only need limited functionality? If so, how many of these types of users will there be and what types of tasks will they need to accomplish? Some examples would be faculty members who strictly review applications for admission, student workers who strictly use the system to enter inquiries or make phone calls, etc.
Faculty reviewers – review applications and materials at different stages with limited edit access, review completed applications and enter decision recommendations (multiple faculty members will need to be able enter different recommendations on one application)
Staff – multiple roles and permissions assigned based on role, varying from read only access through full create/edit/delete access. Administrators will need access to create new roles and change assigned role.
Graduate/International Student Applicants – ability to review missing application requirements, upload documents, change/edit recommender information
For a single graduate application, between 3-15 people are likely reviewing an application and making an admission recommendation
62. Are there any users who will strictly be reviewing applications? If so, how many of these will there be?
See above
63. How many users will be involved in application review using the new system?
Grad faculty reviewers/approvers - 400
All other users – 90
64. How many users will be involved in creating events and event registration pages with the new CRM system?
30 – 50
65. What student information system does USM use? Do you want the chosen vendor to perform integration with this SIS or will USM take care of that internally?
Peoplesoft, yes integration will be part of the solution implementation by the vendor.
66. How many total applications does USM receive annually?
Grad/international – 10,200
Undergrad/international – 18,140

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67. Does USM currently have a text messaging solution? If so, do you want to continue using that solution or do you want a new text messaging tool with the new CRM?

New solution with CRM, defined in the RFP & Appendix C.

68. Regarding a text messaging solution, how many total texts does USM send annually? How many phone numbers would you want supported for the text solution (how many phone numbers would you want these texts to be coming from)?

Usually 12,000 or less daily. 4 -20 source numbers.

69. Approximately how many unique email addresses (contacts) does USM include in email marketing campaigns annually? We are mainly looking for the total number of individual email addresses that will be receiving emails from the communication system throughout the year, not the total number of emails sent.

Grad/International – 10,000-15,000

Undergraduate - have emailed up to 88,000 in one go. That is usually not the norm. Usually, 12000 or less.

grad/undergrad int'l - 20,000 (between prospects and applicants)

online - 6371 emails a day but could sent up to 50,000

70. **Budget:** The grading breakdown indicates that Cost will be 40% of USM's evaluation criteria. Is there a target budget allocated for this project? If so, is the University able to share the ballpark target budget?

No. The bid will be awarded to the vendor that is scored as 'lowest and best' per the RFP document.

71. **Timeline:** Dates shared within the RFP include a bid open date of April 14th and a go-live date of August 1, 2021, with the project start date within 30 days of issuance of a PO.

1. Just to confirm, the bid submission deadline on April 14th is still 2:00PM CST? *Yes.*

2. How long following the bid open date does USM anticipate a decision being made? *Expect a decision within 2 weeks after bid opening but RFP will need IHL approval anticipated to be the end of June, no work can begin until final approval by IHL.*

72. **Solution Ownership:** Is there a team/individual at the University that is designated to become the System Owner? Can you describe your team's technical capacity in regards to CRM and/or a platform solution such as Salesforce?

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There is currently a core team of application administrators that will maintain the system after implementation. Technical resources are available but have no Salesforce experience.

73. Scope: Will this CRM be serving recruitment for the entire institution (all majors/areas of study)?

Yes.

74. Users: How many users (internally at the University, as well as High School/Community College Counsellors) will require access to the CRM?

1. Can USM provide a breakdown of the total number of users by department/type (for example, Undergrad - 8 users, grad - 3 users, International 4 users, etc)?
2. How many administrators of the system is USM expecting to have?

Grad faculty reviewers/approvers - 400

All other users – 90

Administrators 20 – 50

75. Bid format: Section A. “Instructions to Vendors” indicates that each bid must be submitted in a sealed envelope. Are we correct to understand that submission of a physical printed bid package (along with an electronic USB copy) is required to be considered, and USM will not accept a solely electronic submission?

USM will accept sealed bids mailed to the university or electronic submissions when submitted properly.

Electronic submissions can be submitted through the state provided portal (MAGIC). This information is located in the RFP General Terms, Conditions and Instructions for Bids/Proposals as item #35.

Emailed proposals will not be accepted.

76. What are your goals for the student recruiting life cycle? We understand you’re interested in a number of optional features (e.g., student organization portal, event management, elections, advising, donation, and alumni), do you have any longer term strategic objectives around being a Connected Campus? **TBD.**

77. What are your success measures for student recruiting?

N/A

78. What tools do you currently use for your applications hosted on your web portal?

Radius.

79. Does the data between the four departments (undergraduate, graduate, international, and online) need to be partitioned?

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Yes.

80. To confirm, is the “database to collect, input, and manage data on prospective students” (per the RFP) the Campus Management/Anthology Radius system?

Yes.

81. Do reviewers need the ability to enter comments/notes in addition to a decision recommendation? Do reviewers need the ability to annotate any of the submitted documents (e.g., essays)?

Yes.

82. Events:

1. Can you describe all of the event types a new solution is required to power? **See below.**

This is an optional feature but these items are desired.

Single-Day Events

Free/Paid Events

Basic Ticketing

Check-In Management

Waitlist Management

Reminder Notices

Basic Participant Communication

Website Embed Events

Multi-Day Registration

Multi-Session Registration

Virtual Event Capabilities

2. Is attendance tracked for all events? **No.**

3. Are you hosting virtual and online events? **Yes.**

4. Can you provide more information about event codes and their purpose?
TBD.

5. Do you currently use a payment processor? **Cashnet.**

6. What are the current use cases for CASHNet? Do you use it for events and/or application deposits? **Yes.**

83. Can you provide more details on how territory management does/should work?

1. Who at University of Southern Mississippi are assigned territories, what are they, and how often are they re-assigned?

Yes, have territories assigned.

84. How many Salesforce internal and external users are you expecting?

Grad faculty reviewers/approvers - 400

All other users – 90

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85. Approximately how many users would use the high school/community college counselor portal?
1. Can you provide more detail and requirements around the “rules editor that allows users to build custom automations to support their processes” (per the RFP)?
TBD
86. Can you provide more detail and requirements around the customized, program-specific faculty web portal for review of completed applications and associated documents? Approximately how many users would use the faculty portal?
Grad faculty reviewers/approvers - 400
87. What insights do you need at the end of this engagement? Can you please list the top KPIs that you would like to track?
TBD
88. Do you envision utilizing Tableau for data visualizations and predictive analytics with an integration to the new system?
Yes, if this option is available.
89. Can you provide more information about the communication plans at each stage of the enrollment process?
TBD
90. Can you provide more information about the workflow processes used to manage the review at various stages of the enrollment process?
TBD
91. Do you currently use a marketing tool or does the Campus Management/Anthology Radius system fulfil your email marketing needs? Do you use chat?
Campus Management/Anthology Radius is what we have currently to use.
92. Are you currently using any tools to support SMS outreach?
Yes but not a long term product, this solution must provide that functionality.
93. Are you looking to monitor social media channels or simply link an applicant’s accounts to their profile? **Both.**
94. In appendix C, you reference drip marketing, how many emails are in these campaigns?
Grad/International – 10,000-15,000

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Undergraduate – Usually 12,000 or less.

Grad/undergrad int'l - 20,000 (between prospects and applicants)

Online – 6,371 emails a day but could sent up to 50,000

95. Do you send one-off blast emails, and if so, what is the largest list size you may send to at one time?

Undergraduate - have emailed up to 88,000.

96. How many emails may you need to send per day from the CRM?

Usually 12,000 or less daily.

97. Do you envision emails to your lead/contacts being automated?

Yes.

98. Who owns campaign planning and execution including events? Is this a Marketing or Admissions responsibility or both?

Admissions.

99. Are you hosting events to bring in prospective students/leads?

Yes.

100. How do you reconcile leads? What if a student applies to more than one program?

TBD

101. What is the likelihood for someone to be a lead/applicant/enrolled student in more than one recruitment or admissions process at one time?

Highly likely.

102. Are you buying leads/lists?

Yes.

103. What is your current total database size including all leads/contacts?

TBD at implementation.

104. How do you currently prioritize your leads for lead qualification? If you are not currently qualifying leads, is this something you envision doing in the new system? TBD

105. Do you have an existing middleware and/or preferred integration approach?

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Yes but part of existing product, not to use in the future.

106. In appendix C, you list the required integrations. For each listed integration, can you describe the:
1. System and ETL tool in use
 2. Direction - inbound, outbound, bi-directional
 3. Frequency - near real time, hourly batch process, one time load
 4. Data - what data is passed through the integration
 5. Volume - estimated transactions per day
 6. Cloud / On Prem - cloud based system or local server that needs VPN access
 7. Known Restrictions - any restrictions for this integration (max number of API calls, API throttling, etc.)

TBD

107. Do you have an internal resource who will be performing integration development on this project or are you looking for your selected vendor to fully complete the integration?

There are limited technical resources available for implementation, vendor will complete the integration.

108. What are your key demographic factors? Eg. location, age, gender, etc

N/A

109. What are your key behavioural factors? Eg. Web visits, form submission, video views, webinar attendance etc.

TBD

110. Define a qualified lead (i.e. when do you consider it hot)?

TBD

111. Lead Handoff

1. Lead assignment - How are leads assigned to teams? What are your lead assignment rules?

TBD

112. Do you have any existing nurture programs that you would like us to recreate in the new system? If so, how many and average number of steps?

TBD

113. Our solution is priced by annual application volume. Could you please provide annual application volume segmented by Undergraduate, Graduate, International, and Online?

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Grad/international – 10200

Undergrad/international – 18140

114. Will each group require their own instance? (Undergraduate, Graduate, International, and Online)

It has been discussed to possibly have two instances; Undergraduate, Graduate

115. In reference to your mention of an expected 1,000 or more users, do you plan to on-board all users at once? If not, could you please describe your on-boarding and adoption timeline/plan for all 1,000 users?

Grad faculty reviewers/approvers - 400

All other users – 90

Administrators 20 – 50

116. Is there a willingness to go live as features & functionality become available during implementation? (or do you prefer a waterfall approach)

That is a possibility but will depend on the scope of the functionality delivered

117. Is there an anticipated vendor demo date and an award date? or goal to reach these milestones?

Expect a decision within 2 weeks after bid opening but will need IHL approval anticipated to be the end of June, no work can begin until final approval by IHL.

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