Clarification Questions for NP-22-0002 - CRM

1. When will responses to questions be posted? Can the submission deadline be extended to 10 business days after all responses have been posted to allow for a complete/accurate response? See Section 1.10 Clarification of Bid Solicitation. See the solicitation schedule in Section 4.7. An extension is not planned at this time.

2. The majority of functional requirements of this RFP appears to be repurposed from previous RFPs released by other institutions. Is NPC's intent/desire to procure the same system that these institutions selected? This RFP was created by National Park College to meet the needs and inquiries of National Park College.

3. Given the unique needs of NPC for their enrollment efforts, does NPC have any specific requirements addressing the needs of their specific population(s) served? The specific needs are outlined in RFP Sections 2 and 3.

4. Section 4.1 does not allocate scoring to vendor implementation despite the RFP mentioning implementation (including an ask for an implementation timeline). Will NPC add specific scoring criteria for vendor implementation services? Implementation is addressed in Section 3.1 (I) in a timeline reference. Details for implementation may be covered in Demo/Q&A.

5. Does NPC have any requirements with regard to vendor-managed implementation services? We envisioned having vendor support/management for implementation. Details of implementations shall be created with selected vendor and included in performance standards.

6. Does NPC have a preference between DIY solutions requiring NPC's technical resources to self-implement the solution or solutions that offer vendor-managed implementation services? We were envisioning vendor-managed implementation and to provide detail of what that looks like.

7. Is vendor-managed implementation services (e.g. project management, implementation staff, regular project meetings, etc) required of the vendor/proposed solution? Yes, that would be expected. In our experience, a typical implementation includes these services.

8. Is there a requirement for the vendor to attend virtual/live working sessions with the NPC team for some of the implementation meetings/workshops (vs solely initial training/onboarding)? Yes, that would be expected.

9. What College staff have been/will be assigned to the project for implementation? Appropriate NPC employees shall be assigned at the time of project.

10. What payment gateway(s) are currently in use? Nelnet

11. When does NPC anticipate to begin project implementation? We anticipate a Spring 2022 start date.

12. When does NPC anticipate to go live with the new CRM? This is fluid/TBD based on implementation process.

13. Is NPC permitted to sign two (2) contracts as a result of the RFP if the selected solution is a joint proposal from two vendors that meet all other criteria of the RFP? No. This is listed in Section 1.13 Prime Contractor Responsibility.

14. Can you please provide the titles of the members of the proposal evaluation team? It is against procurement policy to reveal evaluation team members or the related departments.

15. What are NPC's current CRM & online application systems? NPC does not currently have a CRM. We have a home-grown application that we are looking to improve.

16. What other systems are being utilized by recruitment and admissions beyond the current CRM and/or online application system? The products with which we will need to integrate are listed in the RFP. See sections 2.3 and 3.1 (D).

17. 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? We will discover this answer during the CRM implementation process.

18. Why is NPC seeking a new CRM? To better serve our students and alumni.

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

20. What departments (e.g. undergraduate, graduate, international) will be utilizing the new CRM? Multiple. This will be utilized campus-wide.

21. Is there a phasing plan for the project to cover different departments and aspects of the solution? If so, can this please be shared? This would be determined during implementation.

22. Will NPC be holding demonstrations from shortlisted vendors prior to vendor selection? Demonstrations shall be held according to the schedule in section 4.7 of the solicitation. Also, see section 4.4 concerning scores and who shall be selected to do demonstrations. All steps must be completed before final vendor selection is made.

23. How many prospective suppliers will be invited to provide demonstrations for this project? Three. See section 4.4.

24. Will demos be required in person? No. Demos will be provided via internet (e.g. Zoom, Microsoft Meeting, etc.)

25. Will demos be required to be live (vs. recorded videos)? Live demos are required, although you may have a recorded video during your demonstration. There will be a live Q&A session during the demonstration period.

26. Has a budget been allocated and approved for this project? This is not relevant at this phase of the project.

27. Which College department is funding this project? This is not relevant to the RFP.

28. What is NPC's budget for the project? Budget has not been released for this project.

29. Given the current COVID-19 situation, is funding secured for the project, or is there the possibility of funding being reprioritized to other initiatives? No.

30. What impact does NPC anticipate on vendor/solution selection and/or implementation given the COVID-19 situation? None.

31. How is NPC currently integrating between the CRM/online application and the SIS? N/A (no CRM at this time)

32. Are there any other systems NPC intends to integrate with the CRM? Details of integration are listed in Section 2 and 3 of the RFP.

33. What staff and resources does NPC 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)? To be discussed during demo.

34. What is NPC's annual inquiry volume? Please breakdown by departments that would be utilizing the solution. We do not have an annual inquiry volume number. We do not have a CRM to track data that granular. Software shall be used campus-wide.

35. What is NPC's annual application volume? Please breakdown by departments utilizing the solution. NPC averages 4,300 annual student applications per year (This is located Section 2.2). Software shall be used campus-wide.

36. How many users will be admins/power users who may need full system access and/or mass communication access? Final numbers shall not be known until understanding of software capabilities and implementation. Possible volume at this point is upwards of 10.

37. How many users will be basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access? Final numbers shall not be known until understanding of software capabilities and implementation.

38. Is there a preference/requirement for solutions that offer unlimited email sending without per-contact/message costs? We don't have a preference at this point, as we will need to review options.

39. Is there a preference/requirement for solutions that offer unlimited text messaging without per-contact/message costs? We don't have a preference at this point, as we will need to review options.

40. Is there a preference/requirement for solutions that can expand in the future further across campus beyond admissions (e.g. student success, advancement, etc)? We are interested in the full student journey. ("first touch to alumni")

41. Has NPC seen demos of any potential CRM solutions or related technologies in the last 12 months? If so, which ones? Request for Information (RFI) research has been done, however demos have not been completed.

42. Has NPC worked or consulted with any vendors and/or external sources in the development of the requirements for this RFP? If so, please identify. Request for Information (RFI) research has been completed.

43. How many full users (able to configure the system, update settings/workflows, write reports, use live chat, own cases) do you anticipate will access the solution? Actual numbers are unknown at this time, but could anticipate 5-10 full users.

44. How many light users (create and update contacts, run/ view pre-written reports, manage communication and events) do you anticipate will access the solution? Actual numbers are unknown at this time, but could anticipate 8-10 light users.

45. How many chat users do you anticipate will access the solution? The need for chat shall be determined during Demo/Q&A session.

46. What is NPC's preferred integration method? Integration method shall be proposed by vendor. Integration may be discussed during Demo/Q&A (if selected to participate). Final details of integration may be negotiated with selected vendor.

47. Are there any third-party software systems that NPC would want integrated into the CRM? See Section 2.3 of Solicitation for software integration list.

48. Page 9, item D "Communication Methods", #2D - "CRM ability to integrate/connect with NPC campus email service to automatically log non-CRM email communications between staff and contacts in the CRM?"
What non-CRM email service provider are you using (e.g., Exchange, Office 365, Gmail)? If in house, what system? Mailchimp**.**

49. Page 9, item D "Communication Methods" -
Are you willing to consider a solution that integrates with a third-party e-mail marketing service? Possibly.

50. Page 9, item D "Communication Methods", #2F - "Live Web Chat and/or Chatbox functionality"
Would software that can integrate with a live chat service selected by the college be considered? Yes

51. Page 9, item D "Communication Methods", #2E - "Call-center functionality"
Does this refer to integration with a phone system or auto-dialer? If so, what system does the college use now or plan to use in the future? Presently we physically man our call center. You may submit integration or auto-dialer ideas with your proposal.

52. Page 11, item G "Records Management", #8 -
What types of users are you expecting? Students? Staff? Members of the public? Prospective and current students and alumni

53. Page 11, item L "Concurrent Users" -
How many users would you expect to have of each type? Final numbers shall not be known until understanding of software capabilities and implementation. Possible admin/power users at this point is upwards of 10.

54. **What is National Park Colleges average student enrollment per year?** 1,900

55. Page 11, item G "Records Management", #9 - "Does your CRM provide an application solution?"
Does this refer to a solution to let students apply for admission? Yes

56. Page 11, item G "Records Management", #10 - "Explain product's ability to nurture enrolled students and alumni."
Please explain more about what is meant by 'nurture'. In this instance, nurturing means any tools we might utilize to enhance student engagement – nurturing relationships and providing support during each phase of their journey (onboarding to graduation).

57. Page 10, item F "Event Management", #3 - "Do the event management components of the CRM include event pages (e.g., event calendar, registration forms, landing pages, confirmation messages, etc.)?"
Would the college be open to software that integrates with third-party services to provide the

public face of these functions assuming that data about events, registrations, and so on, were visible and reportable from within the software? Possibly, but not ideal.

58. What CRM system are you currently using? We currently do have a CRM system.

59. How many total users will by using the new CRM system? Final numbers shall not be known until understanding of software capabilities and implementation. Campus shall be used campus wide.

60. How many users will be system administrators? Final numbers shall not be known until understanding of software capabilities, implementation and costs. Possible volume at this point is upwards of 10.

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. Final numbers shall not be known until understanding of software capabilities and costs. It is estimated there could be upwards of 10 admins/power users. Software shall be used campus wide.

62. Are there any users who will strictly be reviewing applications? If so, how many of these will there be? Final numbers shall not be known until understanding of software capabilities and costs.

63. How many users will be involved in application review using the new system? Final numbers shall not be known until understanding of software capabilities and costs.

64. Do you want the chosen vendor to perform integration with PeopleSoft or will the College take care of that internally? It is expected that the vendor shall perform integration and assist NPC staff as well when needed.

65. How many total applications do you receive annually? NPC averages 4,300 annual student applications per year (This is located Section 2.2).

66. Do you 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? Yes. We would like to consider texting solutions offered.

67. Regarding a text messaging solution, how many total texts do you 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)? 28,230 texts annually. Number of phone numbers for support shall be based on cost, feasibility, logical use, etc. One number would be optimum.

68. Approximately how many unique email addresses (contacts) do you 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. Apprx 13,296 this last year for students, applicants, and prospective students.

69. Do you want the new system to have an applicant portal where students can login to upload documents, check their application status, receive communication from the college, etc? We would be interested in an applicant portal, depending on cost, feasibility, etc.