RFP 23P-001: CRM SOFTWARE SOLUTION
ADDENDUM No.2

The proposal due date and time for RFP 23P-001 is changed to: **Wednesday, December 21, 2022** at **3:00PM Local Time**

Please note Addendum No. 3 is forthcoming and will be posted no later than December 13, 2022.

Questions and Answers
Question 1: How many application types are there?
Answer 1: There are six credit application types and one for continuing education. Currently our request is for the credit applications only as well as the nursing application.

Question 2: Please provide examples of each application type.
Answer 2:
- Dual High School Student – still enrolled in high school
- Graduate Transfer - transfer student with an associate's degree or higher
- New Student - high school or GED graduate at the time college classes begin
- Re-admit - returning Harford student
- Transfer - transferring in credits from another college/university to complete a degree
- Visiting - non-degree seeking student, visiting for a semester from another college/university
- Nursing - only program specific application used on credit side

Question 3: How many high school counselors are there? How many documents are uploaded by them to the student portal? How are documents associated with the correctly identified student?
Answer 3: We do not currently have a portal for high school counselors - this would be a new feature.

Question 4: Please list the forms that will need to be included in the development effort.
Answer 4: Can you clarify the type of forms, such as event forms, IT, applications or procurement?

Question 5: How many years of data need to be migrated? How many students/rows?
Answer 5: That discussion has not occurred yet.

Question 6: Do you have a preferred integration tool?
Answer 6: Please see Technical and Security Requirements A-4 (Q40-59) for questions related to integration.

Question 7: Are you open to moving off the Signal Vine texting platform if there are better alternatives?
Answer 7: We are open to learning more - our contract ends June 30, 2024.

Question 8: Please describe the review and approval process of an application.
Answer 8: We are an open-access institution. Apps are only held if the student is a non-citizen - allows us to request documentation, not allowed on campus, date of birth and SSN discrepancies, as well as possible BOTs. Currently, apps are reviewed daily and can be pushed as-needed for immediate assistance. The steps are: Creating an ID number, checking for duplicates, verifying and pushing, then accepting and adding student holds as needed. This is a manual process, typically done by one person and can take 30 minutes to a few hours, depending on the number of applications received. Acceptance emails are sent manually each day using our reporting tool (Argos) and mail merge.

Question 9: The RFP references a Mitel Phone system but requests no functional requirements that will require integration with the solution. Is there an integration that is needed?
Answer 9: Yes, if possible, but not a high priority. We are open to a demo.

Question 10: Do you have a preferred Payment Gateway?
Answer 10: The college uses TransAct.

Question 11: What is the volume of applications and forms?
Answer 11: We average 6,000 applications a year. We are planning on increasing our events, but currently use SignUpGenius and Harford's website for event registration. Our largest event each year is typically the fall and spring open houses - we can expect to receive about 200 RSVPs for each event. Starting in Spring 2023, Admissions is looking at expanding the number of events we offer and the number of attendees we have on campus.

Question 12: Do you require document generation and e-signature?
Answer 12: We currently do not utilize these features - this would be a new feature.

Question 13: How many event registrations are there and how many users will need access to create events in the system?
Answer 13: Approximately 20-30 yearly that will need registration. We also would need a registration tool for recurring events such as weekly campus tours and monthly information sessions on campus. As noted above, our office is looking at expanding our events offerings and number of visitors to campus. Depending on the product chosen, possible 3-5 full users to create the events.

Question 14: How are application progress reports currently shared with external partners (school counselors)?
Answer 14: Our shares student data with our local school system through a data exchange as well as a secure online file transfer - this process would likely still continue even with the addition of a CRM. Admissions currently does not have any method to share individual application/student updates with school counselors other than manually - anything we share with the school system is large scale data.

Question 15: What is your document management system?
Answer 15: Banner Document Management System (BDMS)

Question 16: Do you have Ellucian Ethos?
Answer 16: Yes.

Question 17: How many contacts are engaged through your marketing tool annually?
Answer 17: We do not currently have a CRM. We use Constant Contact in addition to mail merge and Signal Vine for outreach.

Question 18: What is your estimated bulk email marketing annual message send volume?
Answer 18: Acceptance emails are sent daily and we receive approximately 6,000 applications in an academic year. We also use Constant Contact for large events, such as Open House, with around 2,000 emails. We currently have 6,188 contacts in Signal Vine and have sent 31,437 messages since we launched with them in in winter 2021. Constant Contact is a shared account - estimated contacts for Admissions is about 8,000 - this includes applicants and inquiries. Admissions is focused on building our inquiry pool with the college's first ever name buys from College Board and Naviance.

Question 19: Please provide the number of users needed for your advise solution, based upon your:
   a. Provost
   b. VP and/or director of retention/student success
   c. VP and/or director of student services/student affairs
   d. VP and/or director of academic advising
   e. Advisors
   f. Faculty with advising responsibilities
   g. Faculty without advising responsibilities
   h. Adjunct Professors
   i. Case Managers
   j. Student Success Managers

Answer 19: We have not started discussions regarding advising. As noted in the RFP, the college is interested in scaling this product in the future to other offices.

Question 20: Are there other offices using Signal Vine and ProvideSupport?
Answer 20: Yes, Signal Vine is used often by other offices including financial aid and enrollment management operations. The Office of Admissions used Provide Support mostly during the pandemic - our financial aid office also uses ProvideSupport currently.

Question 21: Can you please confirm whether the demonstration will be held in-person or virtually?
Answer 21: We are open to working with a vendor on this.

Question 22: After reviewing your Term of Contract details, we are willing to agree to your request for a one year period, with the College having the exclusive option of extending the contract for five additional one year periods. That being said, we will be adding a 5% escalator to each additional year after year 1. Is this 5% escalator something your team would be willing to move forward with in this process?
Answer 22: The Pricing Form in the solicitation document is broken out into year one pricing, and the pricing for years two through five (inclusive). Annualized costs for years two through five may be established and described on a separate page, however, the total of those costs must be inserted in the pricing form on line 1.2.

Question 23: As our office locations are still closed due to COVID, would you kindly consider waiving the hardcopy shipment requirement and accept a digital copy of each the Technical and Pricing proposals via email or secure link by the submission deadline?
Answer 23: No. Please follow the submission format as specified.

Question 24: Within the RFP's number 7 Proposal Format section, it mentions "Affidavits must be included with the Technical Proposal submittal", can you please confirm that the affidavit this is referring to is he page that includes the Non-Collusion, Suspension and Debarment Solicitation document?
Answer 24: Correct. The Affidavit is page 14 of the solicitation document

Question 25: Would the College consider a digital submission for this RFP? If not, would the College consider decreasing the number of copies required? The current requirement of ten hard copies will require a very large amount of printed material not consistent with modern sustainability practices.
Answer 25: Please follow the submission format as specified

Question 26: What CRM do you currently use?
Answer 26: We do not currently use a CRM - the college has never used a CRM.

Question 27: How do applicants currently apply? Will the new system be used to replace that application?
Answer 27: 6,000 credit applications over the year - this includes winter, spring, summer and fall terms. Yes, the CRM will need to replace the application module - this is our top priority. We currently use Banner Student Self-Service. We also have a very small number of students who submit paper applications.

Question 28: How many total users will by using the new CRM system?
Answer 28: 15 from Admissions/Enrollment Management initially. IT staff will also need access to the system.

Question 29: How many users will be system administrators?
Answer 29: This number of system administrators will be based on file specs.

Question 30: 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.
Answer 30: Yes, we have not confirmed the amount of limited function users yet, but will possibly need access for student workers.

Question 31: How many users are involved in application review? Are there any users who will strictly be reviewing applications? If so, how many of this type of user will there be?
Answer 31: There are two people in the office who currently run the online applications. These two have already been identified as full users. As mentioned earlier, our office is open access so most of the application review is related to system processing.

Question 32: How many total applications does the college receive annually?
Answer 32: 6,000 credit applications - this represents winter, spring, summer, and fall.

Question 33: Approximately how many unique email addresses (contacts) does the college 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.
Answer 33: In addition to the 15 users, there is a general Admissions account and an Enrollment account. We have also recently added a dual enrollment email account.

Question 34: Do you want to continue using Signal Vine for texting or are you looking to replace it as part of the new CRM system?
Answer 34: We are open to learning more - our contract ends June 30, 2024.

Question 35: Do you want the selected vendor to perform integration between the CRM and Banner on behalf of the college?
Answer 35: Please see Technical and Security Requirements A-4 (Q40-59) for questions related to integration.