RFP 23P-001: CRM SOFTWARE SOLUTION
ADDENDUM No.3

Questions and Answers

Question 1: There is mention of 15 user licenses for Admissions and/or Enrollment Management. Do these already include staff from IT, students etc or will additional licenses be needed to accommodate these individuals? What is the total number of licenses?

Answer 1: Yes, 15 user licenses for Admissions and Enrollment Management and the college has interest in scaling this product in the future to other offices. The number of IT licenses will be based on file specs.

Question 2: What is Harford's expectation of integration between the future CRM platform and each of these tools? Which ones is Harford open to replacing in favor of a more consolidated solution?

Answer 2: We are open to learning more about tools within the CRM and taking demos into account when contracts ends with other vendors.

Question 3: Does Harford have a need to share live or static report/dashboard data with external partners?

Answer 3: Possibly. We currently have a data exchange with the local public school system.

Question 4: Does Harford have a data warehouse where archived data is stored? What does Harford's data retention and/or archival strategy look like?

Answer 4: HCC does not currently have a data warehouse.

Question 5: Could Harford explain at what point in the prospect/student lifecycle it intends to integrate CRM data with Banner SIS, and at what point in the lifecycle Banner SIS should act as the "source of truth" for this data?

Answer 5: The student's data will reside in Banner once accepted and then be considered a student. Once accepted, they will meet with an advisor to register for classes. Advisors have access to Banner, but not a CRM.

Question 6: Does Harford currently use/have an ETL/iPaaS tool for integrations? If so, which one?

Answer 6: Yes, the college has iPaaS in Ellucian Ethos for its integration platform.

Question 7: Is Harford open to using a third party product in place of Microsoft Forms for events?

Answer 7: Yes. Admissions currently uses our website (most event forms), signupgenius, zoom, and sometimes Microsoft forms for events.

Question 8: What payment processor is currently being used?

Answer 8: TransAct

Question 9: Does Harford have any other reporting or BI tools that are not named in the RFP?
Answer 9: No.

Question 10: With the current phone system (Mitel), is there a need for inbound and/or outbound calling?
Answer 10: Mitel covers inbound and outbound calling.

Question 11: Is there a predetermined budget, or budget range, that has been defined for this project?
Answer 11: This information will not be disclosed.

Question 12: You asked "Is the portal customizable by application type?" Could you elaborate on the ways in which you would like the portal to be customized?
Answer 12: The college has six credit application types, and one for continuing education. The current request is for the credit applications, listed below, as well as the nursing application.
- 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
- Readmit – 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 13: On page 6 of the proposal, 3. ii. And 3. iiii. Both request three (3) current references each. Are six (6) total references required? The form is set up for three but both question prompts refer to the form.
Answer 13: We are looking for a minimum of three references of similar size and scope within the past 5 years, If the references are in the area of higher education, they will be given extra weight.

Question 14: Could you please verify the numbers of user that will use the solution:
  a. students/participants: (page 7 states 6,000 credit applications, what is the total number of students that would need access?)
  b. Admissions staff: (page 7 states 15 users/licenses from Admissions and/or Enrollment staff, are there others?)
  c. IT staff/Help Desk:)on page 7 it states "may also need access to the system), do you want these individuals included in licensing estimates? If so, how many?)
  d. How many total FT and PT users?
  e. How many total student workers with limited version?
Answer 14:
  a. This is correct
  b. This is correct
  c. This depends of file specs.
  d. The Office of Admissions/Enrollment Management will have 1 PT, 14 FT
  e. 1-2 student workers