![MCLA - Massachusetts College of Liberal Arts logo]

**Addendum No. 2**
to
Request For Proposals for
Admission Customer Relationship Management
Software

**RFP 2023-002**

Massachusetts College of Liberal Arts (MCLA)
North Adams, MA

1/25/2023

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This Addendum forms a part of RFP 2023-002 documents and modifies the original dated December 26, 2022, as noted below. Acknowledge receipt of this Addendum within your sealed proposal. Failure to do so may subject the Bidder to disqualification.

This Addendum is comprised of page numbers 1 of 10.

**Responses to Questions**

1.  Are vendor proposals to be submitted via email or does MCLA require hard copies of proposals? **Hard copies should be submitted and include separate technical and pricing proposals and submitted to.**

    William Norcross
    Purchasing Manager
    Massachusetts College of Liberal Arts
    Administration and Finance
    375 Church Street
    North Adams, MA 01247

2.  What is your current CRM system for admissions and student success? **Liaison EMP**

3.  What is your demonstration schedule? **Based on vendor submissions, MCLA reserves the right to invite finalists to provide demonstration.**

4.  Have you had vendors or demonstrations virtually on campus prior to issuing the RFP? **No**

5.  What is your identified budget for this project? **TBD**

**6.**   Can MCLA share a weighted rubric for this RFP? **See page four of RFP.**

7.   Question on page 6 asks: "Ability to customize application for no institutional functionalities. Can MCLA clarify what they mean by no institutional functionalities?
**This should read "Ability to customize application for our institutional functionalities."**

**8.**   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? **10 – 15**

**9.**   How many light users (create and update contacts, run/ view pre-written reports, manage communication and events) do you anticipate will access the solution?    **15 – 30**

10.   Are you interested in implementing a live chat feature between staff and students? If so, how many live chat users from your staff do you anticipate will access the solution?
**Yes, 10 – 15**

**11.**   Are you interested in non-live chatbot? This chatbot performs multiple tasks, saving staff time and going well beyond simple questions and answers. This assistant answers questions and can route the conversation to a live person if needed and create follow-up help tickets.
**Yes**

**12.**   Please define the authentication method used currently. **Basic login.**

13.   How many fields and records (3 years, 1000 records, etc.) do you need imported into CRM?
**Approximately 5 years and 300,000 records**

**14.**   Do you currently use texting software? If yes, what is the system, and do you intend to continue using it? **Yes, AdmitHub/Chatbot**

**15.**   Do you have a change management plan already in place? Will you be seeking change management services as part of this RFP**? Not at this time.**

16.   What are you envisioning for project team staffing?
**3 – 5 MCLA staff members (from Admissions and/or IT)**

**17.**   Will this be work on top of their day-to-day responsibilities? **Yes**

**18.**   Will they temporary backfilled? **No**

**19.**   Will you have a dedicated Project Manager assigned? **Yes**

**20.**   Will you have a dedicated CRM Administrator for this project? If so, is this an IT resource or functional area resource? **Yes, functional area.**

**21.**   Do you use Office 365 or G Suite? **Office 365**

22. Do you intend for the awarded vendor to teach you how to configure for you and the awarded vendor to share the configuration? Or do you expect the awarded vendor to do all configuration? **We would like the vendor to set up the initial configuration and then train MCLA staff.**

23. What data visualization tool are you currently using on campus (e.g., Power BI, Tableau, etc.)? **The CRM should provide the data visualization tools necessary.**

24. What is your expected Go Live date? **August 1, 2023 for Fall 2024 recruitment, negotiable.**

25. Please clarify which of the following Pricing Models you are requiring:
A Fee Schedule (i.e., Hourly Rate Card) with rates fixed for the duration of the project (i.e., Invoice for Time and Expenses) and estimated hours for 1, 3 and 5 years. Or A Fixed-Price Bid? **A fixed-price bid**

26. What is the approximate data volume (# of records) which will need to upload in the new CRM system? **Approximately 5 years and 300,000 records**

27. In which file format the data will be provided for upload in the new CRM system?
**csv, but can work with vendor depending on needs**

28. What type of customer support (L1, L2, L3) for the implemented new CRM system is expected to be delivered? Could you please share the required support hours as well for East Coast? **The CRM must provide East Coast business day customer support (7 am – 6 pm), at minimum.**

29. Which functionalities are in use of The Common Application system? **We use The Common Application for receiving applications and supporting documents, as well as outreach to prospective students who have not completed their Common App.**

30. Is The Common Application system cloud based? **Yes**

31. Is there a document management system presently in use? If yes, please share details. **No**

32. Which is the College Board system in use? **Student Search**

33. Is ACT implement for Financial Accounting automation? **No**

34. What functionalities are expected from the custom admission application system? Please provide high level detail. **Please refer to original RFP.**

35. Is TouchNet the only online credit card payment system expected to be integrated with the new CRM system? If not, then please provide names of other online credit card payment system which are expected to be integrated with the new CRM system? **Yes**

36. Which feature(s) of FAFSA are implemented / in use? **Currently FAFSAs are imported into Ellucian Banner and are not/would not be transferred to CRM.**

37. Which third party authentication system is currently in use or is planned to be implemented? **Azure Active Directory/Azure SSO is in use.**

38. Which document imaging system is implemented or planned to be implemented? **None at this time.**

39. Which data warehouse system is currently in use or is planned to be implemented? **None at this time.**

40. How many users are expected of the new CRM system planned to be implemented? **Up to 30**

41. What is expected timeline within which the new CRM system is to be implemented**? August 1, 2023 for Fall 2024 recruitment, negotiable.**

42. Are there any other external systems that will be expected to be integrated with the new CRM system? **Ellucian Banner**

43. Is contract negotiable? If yes, do we need to submit markup along with proposal. **The Commonwealth terms and conditions are non-negotiable.**

44. What CRM do you currently use? **Liaison EMP**

45. How do applicants currently apply? Will the new system be used to replace that application? **Common Application. The new system would not replace Common App, but we would be interested in the CRM hosting an MCLA in-house application.**

46. How many total users will by using the new CRM system? **15 – 30**

47. How many users will be system administrators? **5 – 10**

48. 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.
   - **Student workers who will use system to enter inquiries or make phone calls.**
   - **Athletic coaches who will use system to view application status and application checklists.**

49. 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? **Approximately 10-15**

**50.** How many total applications does the college receive annually? **~ 2,500**

**51.** Will the new system be used to manage events and event registrations? **Yes**

**52.** Do you wish to use the new system to create an applicant portal where a student can apply, upload documents, and continue to receive communication throughout the application process? **Yes**

**53.** 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. **Approximately 200,000**

**54.** Do you have a texting tool that you currently use? If so, do you want to continue using that tool with the new system or replace it altogether? **Yes, possibly replace it.**

**55.** Do you want the selected vendor to perform integration between the CRM and Banner on behalf of the college? **Yes**

**56.** Would you please confirm that the method of submission requested is via email to william.norcross@mcla.edu? **Hard copies should include separate technical and pricing proposals and should be submitted no later than 2:00 pm on Wednesday, February 1 to:**

William Norcross
Purchasing Manager
Massachusetts College of Liberal Arts
Administration and Finance
375 Church Street
North Adams, MA 01247

**57.** What is the volume of data that MCLA is expecting to migrate to the CRM platform? Please help with information on data types (e.g., student information, documents etc.) which is envisaged to be migrated to new CRM. **Approximately 5 years and 300,000 records.**

**58.** Elaboration needed on how many types of "Events" exist with respect to MCLA's current courses, what is the nature of these events (Only online or Online + Offline both etc.) How MCLA expects the CRM to manage these events. Clarity also needed how MCLA intends to use the solution (e.g., to capture leads from events etc.) for event management etc. **MCLA offers several on-campus and virtual visits throughout the year. The CRM should have the ability for students to register for events, receive auto-respond emails, receive invite, confirmation, no-show, thanks for attending automated emails through each events cycle. The CRM should also be able to manage attendance (attended vs. no-show), etc.**

**59.** Kindly elaborate on the number of constituencies MCLA currently has and how each constituency will be using the solution (an example on journeys involving all constituencies will help) **3-5**

60. What is the kind of integration the client is looking for in their solution? Clarity on integration touchpoints would allow for better understanding of the integration needed. **The CRM should have the capability to import Common Application data and the ability to move data between the CRM and Banner.**

61. Elaboration needed on the kind of solution the client expects regarding credit card payment, the information that has to be captured etc. **Credit card transactions must hand off to TouchNet through their vendor interface. Credit card information cannot be stored on MCLA servers.**

62. What is the expectation regarding services for print material? Will the solution be used to create postcard templates; be integrated with some other solutions for printing etc. **The CRM should provide personalized print materials based on college templates.**

63. Need elaboration on the kind of data that is to be migrated into Ellucian Banner (e.g., Student name, documents etc.), the size of data to be migrated etc. **Please refer to original RFP.**

64. Elaboration needed on ability to integrate financial aid literature. (Tools the solution will have to integrate with, data to be exchanged etc.) **Financial Aid award data in Banner will need to be imported into CRM and viewable by students. In addition, the CRM should have the ability to produce Financial Aid award letters to accepted students.**

65. Elaboration needed regarding the 3rd party/parties being used for authentication. **Azure SSO**

66. Elaboration needed on the use case for document imaging and if the solution will have to provide native document imaging or if integration with a 3rd party tool is preferred. **TBD**

67. How many active number of users does the college foresee using the CRM solution (Please include both mobile and desktop users.) **We anticipate approximately 150,000 active users/students in the CRM.**

68. From the RFP, we understand that the CRM will be used by multiple teams (e.g., admissions, alumni, dual credit etc.). Further details regarding the specific teams (E.g., undergrad team, international team etc.,) using the platform and how each team plans on using the tool would help us understand the requirements in greater detail and in turn, provide a much better solution. **Primarily undergraduate admissions, graduate admissions, and financial aid.**

69. How many types of courses and services are currently being provided by the college to students which will be managed through the CRM? What are the challenges being faced with the current CRM, any insights will help us propose a better solution. **Please refer to original RFP.**

70. From the RFP, we understand that the solution will have to integrate with multiple 3rd party systems, apart from the systems listed in the RFP (EAB, Ellucian Banner etc.,) are there any other 3rd party integrations does MCLA foresee at this point in time? Kindly mention if any. **None at this time.**

71. What are the functionalities for which the Ellucian Banner is being leveraged currently? **Student and Financial Aid**

    - What are the use cases of Ellucian Banner & CRM integration? **Prospect communications, event management, application processing, and data visualization.**
    - What type of integration Ellucian Banner supports? (REST/ SOAP) **Normal export/import at this time.**
    - What type of data exchange format Ellucian Banner supports? (XML/CSV/JSON/FTP) **CSV and SFTP preferred**
    - What is the volume of data/records we are looking forward to processing? (daily/weekly/monthly) **up to 100 weekly, depending on time of year**
    - Is bi-directional sync required? **Yes**

72. What are the functionalities for which the Common Application is being leveraged currently?

    - What are the use cases of the Common Application & CRM integration? **Undergraduate applications and related material are received through Common Application.**
    - What type of integration does the Common Application support? (REST/ SOAP) **Refer to Common App.**
    - What type of data exchange format does the Common Application support? (XML/CSV/JSON/FTP) **Refer to Common App.**
    - What is the volume of data/records we are looking forward to processing? (daily/weekly/monthly) On **average, less than 250 per month**
    - Is bi-directional sync required? **No**

73. What are the functionalities for which the Financial Aid Literature system is being leveraged currently?
    - What are the use cases of the Financial Aid Literature system & CRM integration? **Student access to Financial Aid award date and customized printed Financial Aid Award brochure.**
    - What type of integration does the Financial Aid Literature system support? (REST/ SOAP) **Normal import/export**
    - What type of data exchange format does the Financial Aid Literature system support? (XML/CSV/JSON/FTP) CSV**, SFTP**
    - Does the Financial Aid Literature data need to be stored in CRM? **Yes**
    - What is the volume of data/records we are looking forward to processing? (daily/weekly/monthly) On **average, less than 200 per month**
    - Is bi-directional sync required?  **No**

74. Which Document Management System/ tool is currently being used?
**We are currently researching Document Management Systems at this time.**
- What are the functionalities for which the Document Management System is being leveraged currently? **N/A**
- What are the use cases of the Document Management System & CRM integration? **N/A**
- What type of integration does the Document Management system support? (REST/ SOAP) **N/A**
- What type of data exchange format does the Document Management System support? (XML/CSV/JSON/FTP) **N/A**
- What is the volume of data/records we are looking forward to processing? (daily/weekly/monthly) **N/A**
- Is bi-directional sync required? **N/A**

**75.** Is integration expected with any system to get college board scores of the students? Or will it be a manual entry to the CRM? **Integration is expected.**

**76.** Can you please share more details about the public-facing website mentioned in the RFP document? **N/A at this time.**

**77.** On which platform this public-facing website is built? **N/A at this time.**
- If we are planning to integrate this public-facing website with CRM, then - **N/A at this time.**
- What are the functionalities for which the public-facing website is being leveraged currently? **N/A at this time.**
- What are the use cases of the public-facing website & CRM integration? **N/A at this time.**
- What type of integration does the public-facing website support? (REST/ SOAP) **N/A at this time.**
- What type of data exchange format does the public-facing website support? (XML/CSV/JSON/FTP) **N/A at this time.**
- What is the volume of data/records we are looking forward to processing (daily/weekly/monthly) **N/A at this time.**
- Is bi-directional sync required? **N/A at this time.**

78. What are the functionalities for which MyMCLA is being leveraged currently? **N/A at this time.**
- What are the use cases of MyMCLA & CRM integration? **N/A at this time.**
- What type of integration does MyMCLA support? (REST/ SOAP) **N/A at this time.**
- What type of data exchange format MyMCLA supports? (XML/CSV/JSON/FTP) **N/A at this time.**
- What is the volume of data/records we are looking forward to processing? (daily/weekly/monthly) **N/A at this time.**
- Is bi-directional sync required? **N/A at this time.**

79. Does MCLA have separate portals for the admission process and student management (i.e., after the admission process of an individual is complete)? **Yes**

80. Is the college data warehouse currently the SOR (System of Records)?
    **MCLA does not have a data warehouse at this time.**
    - Kindly describe the current SOR system in place. **N/A**
    - What are the use cases of College Data Warehouse & CRM integration? **N/A**
    - What type of integration does College Data Warehouse support? (REST/ SOAP) **N/A**
    - What type of data exchange format does College Data Warehouse support? (XML/CSV/JSON/FTP) **N/A**
    - What is the volume of data/records we are looking forward to processing? (daily/weekly/monthly) **N/A**
    - Is bi-directional sync required? **N/A**

81. Which document imaging application is being used currently? I**n-house**
    - What are the functionalities for which the document imaging application is being leveraged currently? Storing documents in support of student applications.
    - What are the use cases of document imaging applications & CRM integration. **N/A**
    - What is the volume of data/records we are looking forward to processing? (daily/weekly/monthly) **Approximately 2,500**
    - Is bi-directional sync required? **N/A**

82. Please explain the integration flow & the use cases of the IPAS. **Not applicable at this time.**

83. Can you please explain the 3rd party authentication point integration requirements in detail along with the relevant use cases? **Vendor should utilize single sign for administrative users.**

84. Please provide the following information about the data migration:
    - The number of systems/ databases from which we need to migrate data to the CRM: **2**
    - An Approximate number of records to be migrated. **Approximately 300,000**
    - An Approximate number of objects/ tables. **Unsure at this time**
    - The format in which data is available? CSV, XML, etc. **CSV**
    - Is data cleaning required before we can process it? **Yes**

85. The ask is to update/ notify the student & other participants in the process via email/SMS on various events & stages. What will be the approximate number of SMS and emails to be sent (per week or per month)? **Approximately 50,000 messages per month**

86. Is MCLA using TouchNet with any of the current platforms? **Yes**

87. Do we need to store transactional information or just card details following PCI compliance? **No card information should be stored.**

88. Who are the various users of the system? Students, teachers, student admins, system admins, college leadership, etc. **Prospective Students, Applicants, Admission Counselors, Financial Aid staff, School Counselors**

89. Do all users need a single sign-on? **Vendor should utilize single sign for administrative users.**

90. Which IDP are we planning to use to implement SSO? **Azure SSO**

91. How does a custom admission application currently work? **MCLA uses custom applications for various student populations that do not use Common App.**

92. Will this be a fresh implementation or is there any existing app currently in use for admission applications? **We currently use Ellucian Banner Self-Service for non-Common Application students.**

93. What are the use cases for Print fulfillment services required in CRM?
**The CRM provides personalized print materials based on college templates (preferred, not required).**

94. What are the use cases of online help & direct support forums? **The constituency that will need this service is limited to staff (not student users).**

Please be reminded to acknowledge this Addendum within your written proposal.

--- End of Addendum No. 2 ---