

# EMPORIA STATE UNIVERSITY

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## ADDENDUM

<b>Addendum Date:</b>	<b>November 9, 2022</b>
<b>Addendum Number:</b>	<b>1</b>
<b>RFP Number:</b>	<b>004-23</b>
<b>Questions Deadline:</b>	<b>November 2, 2022 (2:00 pm CST)</b>
<b>Closing Date:</b>	<b>November 16, 2022 (2:00 pm CST)</b>
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<b>Item:</b>	<b>Student Success Customer Relationship Management Software</b>
<b>Agency:</b>	Emporia State University (ESU)
<b>Location(s):</b>	Emporia, KS 66801

**Below are the answers to vendor questions submitted prior to the RFP questions deadline. If you have already submitted a proposal, you can update your proposal prior to the closing date/time listed above.**

1. Do you currently have a vendor providing Student Success CRM? (e.g., Maxient, Microsoft Bookings, etc.)

*We have some products that perform specific, specialized functions; but we do not have a fully integrated robust Student Success CRM – which is what we are seeking.*

2. How important are providing tools for student? Or is this RFP more about empowering advisors, staff, and instructors to work more closely together?

*This RFP is more about empowering and enabling advisors/staff/instructors in a way which gives them every tool they would need to help students along in a successful academic journey from start to finish.*

3. Is there an appetite to move away from Degree Works as your degree audit is a system provides a degree audit aware planner, pathway, scheduler, and registration toolset?

*We would prefer a system that integrates with Degree Works rather than replacing it. We would also like a system that will integrate with the DW Student Educational Planner when it is implemented.*

4. Can you rank the requirements on what is must haves, want to have, and desire to have? So we have an understanding of what is really critical.

**Essential: advisor notes, early alerts, multi-modal communication, ability to quantify student risk, smooth integration with current systems.**

**Important: analytics/reporting, system with high potential of replacing siloed systems containing disparate data, degree monitoring/projection/plan, easy to use/intuitive, granular security, guided/structured pathways, mobile friendly, instructor management, student management, tutoring.**

**Nice to have: administration/maintenance not over burdensome, chatbots, document management, event tracking, student org involvement.**

5. Is Canvas/Degree Works data being fed into Banner?

**Currently, only some test scores and final grades (if the instructor participates) are being fed from Canvas into Banner. Currently, no data is interfaced from Degree Works into Banner.**

6. Does ESU expect the vendor to house the documents or integrate with Hyland OnBase?

**We would like the vendor to integrate with OnBase. If possible, we may additionally desire to have specific private advising documents hosted in the CRM.**

7. When does ESU expect to go live? When would ESU expect to begin realizing the benefits from the selected solution?

**Our current projection is to go live in June of 2023.**

8. When does ESU expect to award a vendor? Can you provide a brief timeline?

**The award date depends on the time needed for scheduling of presentations, the presentations being given, the evaluation of the presentations and vendors, and vendor and contract negotiations.**

9. Enterprise CRMs require configuration to implement the institution's business processes. Do you intend for the awarded vendor to teach you how to configure and the vendor to share the configuration? Or, does ESU desire that the vendor do all configuration?

**Depending on the timeline, we would like to be involved in the configuration, if we would be expected to manage the product in the future.**

10. 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?

**Technological authors (configure the system, update setting) = approximately 5-10  
Live chat and owning cases will include the entire advising team and more = 20+**

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

**Without further understanding the system and what is meant by "light users", we are unable to answer. My current understanding is that a "light user" may include our entire faculty.**

12. 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?

**Live chat sounds valuable, but it is not in our priority feature list. Based on my understanding, we would need at least 20 staff to have access.**

13. Can you explain how your team is capturing student engagement/extra-curricular activity data today and help to define those business processes?

*If there is an opportunity for a prize if a student attends the event, we will swipe all Hornet ID cards and draw a winner at the end of an event. Students who are involved in Recognized Student Organizations (RSOs) record their own community service hours through Hornet Central. Athletes record their community service hours through Helper Helper. We count the number of attendees at all of the student activities council events. Fraternity and Sorority Life records membership of all fraternities and sororities. Associated Student Government asks approximate membership of each RSO. They also ask for the names of their executive boards.*

14. Is your team looking to fully integrate Ellucian Degree Works or is the intent for your staff and advisors to have certain data points referenceable within the CRM solution?

*Full integration would be most efficient and valuable.*

15. Please explain your current process for Residential Housing Conduct reporting and how you envision utilizing those metrics within the CRM.

*Our current student conduct system is Maxient, which houses student conduct records and CARE reports. Because student conduct records and CARE Team reports maintain a higher level of privacy than other educational records, data interfaced will need to be limited. One possible piece of data that might interface into the CRM is the NABITA score for a student. ESU will likely work with the selected vendor to identify a sound practice from another institution who uses Maxient and the selected CRM (unless the CRM has the capabilities to securely and confidentially fulfill our needs).*

16. Has ESU identified a budget for this initiative, and if so, is it possible to share that budget?

*We have identified a budget for the Student Success CRM initiative. However, we cannot share the identified budget at this time. We can share that an initial vendor provided us with a quote of \$120,000 for implementation and \$70,000 to \$85,000 annually thereafter. We will be evaluating what each vendor offers.*

17. What strategic challenges is ESU looking to address through this RFP? Are there specific goals ESU is looking to achieve? And in what time period?

*Emporia State University is in the process of implementing a strategic plan that prioritizes adapting to the needs of its students. To realize the potential of that goal, we must make a concerted effort to deliver proactive, data-informed student supports that are scalable across critical areas (i.e., first-year support, pathways through and between majors, advising, academic success, and financial services).*

*Desired outcomes:*

- 1. Create structured pathways to guide students into their academic studies through the first year and beyond.*
- 2. Standardize advising technology and protocols to deliver data-informed, coordinated advising to all ESU students.*
- 3. Strengthen financial aid through collaboration with other units and coordinated, proactive outreach to students.*
- 4. Enable the use of actionable data in support of improved student outcomes and better coordinated student communications.*
- 5. Establish proactive and automated alerts and triggers in specific academic courses and integrated in Canvas regarding student success.*

*What we hope to achieve:*

- Improve retention and graduation rates for all student populations.*
- Improve university access and student persistence.*
- Remove barriers that impede student progression.*
- Increase enrollment, retention, and graduation.*

18. What are some challenges unique to ESU that you think proposing vendors should be aware of as they compose their responses?

*Not sure about unique challenges, but our student body is increasingly first-generation and loan averse. We are currently experiencing some challenges as we identify academic programs in which we will continue to invest and other programs that will be suspended. We have recently transitioned to all professional advisors for undergraduate students, and we are interested in requiring a first-year seminar. Currently, there are no faculty involved in this process, especially since we implemented the professional advisor model. As we do implement this software, faculty will increasingly be brought into the process.*

19. Did ESU evaluate solutions that could meet its requirements through vendor presentations leading up to the RFP release? If so, what types and names of solutions and vendors were evaluated?

*No – For the current project no demos or evaluations have taken place yet.*

20. Can ESU please clarify if it would like its graduate student population included on the platform?

*We are open to including the graduate population on this platform.*

21. Can ESU please clarify the term length of the awarded contract? On the cover page it lists a term of 4 years + 2 years + 2 years and on the pricing page it lists a term of 3 years + 1 year + 1 year?

*I believe we are looking to have an initial 4-year contract, with 2 options for renewal of 2 years in length.*

22. Can ESU please clarify if it would like vendors to include academic planning functionality per section h on page 24?

*Academic planning functionality would be valuable but it is not a priority. We will continue to use Degree Works. We would like the CRM to integrate the Degree Works Student Educational Planner when it is implemented.*

23. Point 42 of Section III (Page Number – 20 of 32): Please confirm if you are open for a Hybrid Model with mix of U.S. based Consultants & India based Consultants where one of USA based Consultants will be the main point of contact?

*We want quality consultants who pay attention to detail, who value quality customer service and execute at that level, and do not continually put us on hold or refer us to a page in the “help manual”. We hope for consultants who can be available within 24 hours. If there is a service and assistance difference between your U.S. and India employees, we would need to understand the expectations and differences.*

24. Point 43 of Section III (Page Number 20 of 32): Are you open to the Consultants working within U.S. to travel for meetings/trainings at Emporia State University office as required?

*We would be happy to conduct trainings at Emporia State University, if that is the question.*

25. Are you currently storing data on premise (Local Server) or in the cloud? If in the cloud, which provider is being utilized?

*Our LMS (Canvas), Recruitment software (TargetX), and housing system (StarRez) are in the cloud. Our SIS (Ellucian Banner), document management system (Onbase), and Degree Works are on premise.*

26. Section II – Statement of Work: Do you also require data migration from your current system to new CRM? If yes, please advise on the volume (preferably size) of data? Also, please suggest if data deduplication and data cleansing need to be done before migrating the data to the new CRM?

*We would most likely wish to migrate data; however, not knowing enough about any of the vendors yet or what they offer, we would like to reserve that decision for after we see the products and what they are capable of.*

27. Section II – Statement of Work: Do you have any requirements for setting up the various campaigns? If yes, the please suggest what kind of campaigns you require (i.e., email campaigns, SMS campaigns, survey campaigns, social media campaigns, etc.)?

*We will most likely have at least email and SMS campaigns; however, not knowing enough about any of the vendors yet or what they offer, we would like to reserve that decision for after we see the products and what they are capable of.*

28. Section IV – Specifications (Page Number 24 of 32): Please advise on the total number of users who will access the new CRM platform? Our understanding is that number of students will be 5,324 (including Non-Graduates and Graduates), PLUS the university staff.

*Not all staff will have access to the system and not all faculty will utilize the system. It is yet to be determined whether the student body will be end users of the system; this will be determined by functionality available from vendor systems.*

29. Section IV – Specifications (Page Number 24 of 32): Can you please provide approximate users of Admin Staff (Support Staff accessing the Student Records) and Advisors (Students will require to access Advisors different to Admin Staff)?

*Without knowing what capabilities come with each role, we can only approximate.*

*Admin Staff = 35+*

*Advisors = 20-25*

30. Point r of Section III – Statement of Work (Page Number 28 of 32): Are you looking to integrate with your current Document Management System? If yes, then please advise what documentation management application are you currently utilizing (such as SharePoint, Google workspace, etc.)?

*Yes – We use Onbase by Hyland.*

31. Point v of Section III – Statement of Work (Page Number 29 of 32): Post Implementation - Please suggest the level of support you would require (i.e., 24 hours\*7 days, 24 hours\*5 days, 16 hours\*5 Days, or 8 hours\*5 days)? Any specific business hours and preferred time zone you are looking for the support?

*We would prefer 24/7 support. However, we understand there may be tiers to choose from with different price tags. We will evaluate what each vendor offers.*

32. Points of Section III – Statement of Work (Page Number 28 of 32): We understand the requirement of capturing Hornet Card events in the new CRM. Please confirm if Hornet card system would expose API to get the relevant student data in the new CRM.

**Our Housing System (StarRez) has the capacity to capture Hornet Card events (currently used for check-in and package pick-up in housing).**

**Currently, our Hornet card system does not track events and therefore we do not have an API exposed. Card swipes are used by individual groups or departments and the data is siloed within that area.**

33. Section III – Statement of Work - Third Party Integrations: Please outline any pertinent 3rd Party systems that need to be integrated with the new CRM. Also, if possible, hosting details (On Premise or Cloud) and will they provide the APIs to new CRM to access the data?

*Canvas – hosted*

*Ellucian Banner – on prem*

*Ellucian Degree Works – on prem*

*TargetX – hosted*

*Onbase – on prem*

*StarRez - hosted*

*The potential for using APIs likely exists for all these systems, although it may take substantial work to get them configured & working.*