AMENDMENT TO REQUEST FOR PROPOSAL
Customer Relationship Management Software System

REQUEST FOR PROPOSAL NO. 15P0001SAS
Procurement Officer: Scott A. Snedden

AMENDMENT NO. 1
Issue Date: October 31, 2014

SUBMITTAL DEADLINE:
November 13, 2014 4:00 PM AT

ISSUED BY:
University of Alaska Fairbanks
Procurement & Contract Services
PO Box 757940
Fairbanks AK 99775-7940

Dear Vendor:

The following clarifications and changes have been made to Request for Proposal No. 15P0001SAS for Customer Relationship Management Software System:

The submittal deadline was extended to November 13, 2014 at 4:00 PM AT by Amendment No. 1. A table of questions followed by answers has been provided. All other terms and conditions remain the same.

Sincerely,

UNIVERSITY OF ALASKA FAIRBANKS
Scott A. Snedden
Senior Contracting Officer

ACKNOWLEDGMENT
This Amendment must be signed and returned with your proposal or otherwise acknowledged prior to the closing date and time listed above. If you have already submitted a proposal and need to make corrections, submit a corrected Rate Response Form with this Amendment prior to the closing.

_________________________________  __________________________________
Bidder        Signature

_________________________________  __________________________________
Name & Title        Date email
<table>
<thead>
<tr>
<th><strong>TABLE OF QUESTIONS AND ANSWERS</strong></th>
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<tbody>
<tr>
<td><strong>1.</strong> Please confirm the email address for submission. Is the address <a href="mailto:radanielson@alaska.ed">radanielson@alaska.ed</a> or <a href="mailto:UAF-Solicitations@alaska.edu">UAF-Solicitations@alaska.edu</a>? Send questions and all offers to <a href="mailto:sasnedden@alaska.edu">sasnedden@alaska.edu</a></td>
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<td><strong>2.</strong> Please confirm the proposal validity period - are you requesting 60 days or 180 days. Proposals shall remain valid for 120 days.</td>
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<td><strong>3.</strong> Can there be an extension for submitting this rather lengthy RFP response? There is a one week extension for the RFP. It is now due November 13th. Reference page one of this amendment.</td>
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<td><strong>4.</strong> In the Administrative Evaluation section, the RFP references an Exhibit B to be incorporated as an additional contract document, but we are not seeing that exhibit as part of the RFP package. Can you please provide the exhibit? All document and exhibits are available in the download identified as Cloud Computing Guidelines. Exhibit B relates to University Software Terms &amp; Conditions.</td>
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<td><strong>5.</strong> How many administrative users will use the new CRM and application system? Of those users, how many will only be utilizing the system to review applications and edit data related to the application decision process? UAA - 9 admissions staff members, 1 or 2 temporary staff members during busy times (data entry &amp; data cleanup) a few weeks a year and 2-3 student workers (data entry) very part-time. UAF - 17 admissions staff - 4 of those will be related to the application decision process. 11 student workers - 3 of those will be related to the application process.</td>
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<td><strong>6.</strong> Regarding Requirement 2.5.2, which requests information on how functional users can build, edit, test, query, schedule, and automatically send and report on contacts, can you describe the expected functionality of integration you need with the phone bank? Tele-counseling will be fully integrated into the system, including the ability to update student records, organize calls based on communication plans, queries to create call lists, and reporting on effectiveness of calling.</td>
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<td><strong>7.</strong> The Project Description states that the University seeks to replace the current CRM solutions with more capable ones. Does this mean that the University intends to select a vendor at the conclusion of the RFP process, and that the current CRM solutions are no longer under consideration? Current CRM solution does not provide support for admissions applications or processing. If the current vendor has a solution that meets UA needs, it will be considered under this RFP.</td>
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<td><strong>8.</strong> Please describe how the individual campuses are able to share a single instance of the Banner ERP. The campuses share a single instance of Banner and do not utilize the Multi-Entity Processing functionality (MEP).</td>
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The UA System uses combination of Student Levels (STVLEVL) and Campus Codes to differentiate among our students. The answer is more complex for Financial Aid, but that should not impact this RFP.

Students may apply to more than one campus and their applications will be evaluated by each campus independently. Non-campus-specific information – like test scores and high school GPA are shared by all campuses. The application and program string in the top position rules financial aid disbursement; however, students can concurrently be admitted to more than one UA University.

A complete student record, including all applications for all campuses, can be seen by all admissions staff.

Inquiries and prospects are maintained in independent instances of a CRM. These are not shared and cannot be seen by other campuses, each campus maintains its own set of prospects. This ‘wall’ separating inquiries, prospects and purchased names is paramount.

9. In a shared instance of Banner ERP scenario, how is data maintained separately, and how will this affect the integration with a new CRM system?

UA is dependent on campus codes and level codes to tie student information to a university, catalog, and program string. Integration with the CRM will need to utilize current codes within Banner.

Inquiries and prospects are maintained in independent instances of a CRM. These are not shared and cannot be seen by other campuses, each campus maintains its own set of prospects. This ‘wall’ which would separate inquiries, prospects and purchased names is paramount.

10. In requirement 1.4.2. Explain how the data exchange between the CRM system and UA Banner and DDI systems are to be accomplished. What does DDI stand for?

DDI refers to the university’s digital document imaging system, at UA that is Hyland’s OnBase. It’s also known as our Digital Records and Document Management System.

11. Where is exhibit A? (is it referenced differently in the RFP)

Reference the answer to question #4.

12. 1.35. Explain how the solution will interact with the University’s two content management systems (CMS)? Explain the set-up, and the way in which functionality, look, feel and content are controlled. What are your two content management systems? What are they used for i.e. external facing website?

The public facing websites are used by all departments for anything not related to the ERP. There are calendars, announcements, advertising, departmental information, catalog information, RFP announcements and information.

UAA’s CMS is Cold Fusion.

UAF’s CMS is Roxen.
13. How many prospects/applicants do you expect to log in to your community portal?

UAA will have approximately 7,000 prospects/applicants log into the portal if all applicants go to the checklist.
UAF will have approximately 4,700 prospects/applicants log into the portal if all applicants go to the checklist.

14. If UAA and UAF select a vendor working on the Salesforce platform, will there be a single instance of Salesforce or multiple instances?

This decision would be made based on the characteristics of the single installation of Salesforce. A complete separation of recruitment records is required. Two installations of Salesforce may be needed to achieve that end; however, the University is open to suggestions. UAA and UAF are assuming that the solutions will use the same software, but be separate installation unless there is a compelling reason to have a single installation.

15. How many total staff and Faculty users will need access to the application? Please designate the users by campus for clarity sake.

**UAA:**
- Recruitment Staff - 8 staff - 4 students
- Admissions Staff - 9 staff - 4 students
- System Administrators - uncertain but estimate 2
- IT Developers/Staff - 1
- Reporting - 1

**UAF:**
- recruitment - 6 (5 admissions counselors and clerk)
- communications - 2
- reporting - 1
- processing - 4
- administrators - 4
- 
- students:
- recruitment - 4
- communication - 4
- processing - 3

16. What is your current email marketing solution? Please describe briefly. What is the estimated volume of emails (not campaigns) that is anticipated for both UAA and UAF?

**UAA** uses Microsoft Outlook for emails in Admissions Processing and another Microsoft email product for Recruitment. The amounts vary, but peak time averages are about 4,000 per month. Anticipated usage is 8,000-10,000 per month.

**UAF** - We currently use EMAS Campaign Pro. We use about 1.5 million a year.

17. Based on my reading of the requirements it seems that UAA and UAF want to use a single Applicant Portal. Do you intend the look and feel to be independent of each other?
**UAA and UAF are expecting separate applicant portals. If the portals are the same, they would need unique URL address and completely unique look/feel/content.**

### 18. How many estimated logins a month to the Applicant Portal will be needed for external constituents?

*See the number of applicants in question #13.*

**UAA** - We receive about 7,000 applications a year. We do not track the amount of logins per applications so we cannot give a definitive answer to the amount of logins will be needed.

**UAF** - We receive 400-1600 applications a month, depending on the time of year. We do not track the amount of logins per applications so we cannot give a definitive answer to the amount of logins will be needed.

### 19. How many different programs/degrees will be using the portal for an online application? Please describe. Will required documents differ between programs/degrees?

**UAA** – Undergraduate, Graduate, Non-Degree Seeking (someone attending classes but not in a degree programs – this person does not need a portal), Occupational Endorsements, maybe Nursing (an internal application). The graduate application will have different required documents based on program. We would like 1 or 2 applications that use skip logic to tailor the questions to the needs of the student.

**UAF** - We would like 1 application that uses skip logic to tailor itself to the needs of the student and their programs. Currently we have 9 different applications and it is not fitting our needs.

### 20. How many SMS text messages does UAA and UAF anticipate using each month?

**UAA** – this is difficult to answer because we do not have this capability now. There would be spikes and valleys because we plan to use it to let applicants know when documents arrive or when decisions have been made. There may be some texts to remind prospective students of events for which they have RSVP’s. 1,500 to 2,000? We need assistance with setting this level.

**UAF** - this is difficult to answer because we do not have this capability now. There will be some months that have greater needs than others so I’m not sure a monthly amount would work. Perhaps 1,300.

### 21. To what level of Social Media functionality and/or integration does each campus anticipate needing?

**UAA** – light social media integration.

### 22. Can you provide a copy of the required forms and requirements in a Word version?

I have responded to all email requests for MS Word versions that came to the appropriate address; sasnedden@alaska.edu.

### 23. There is one slight conflict regarding the length that the proposal must remain valid. In information related to costs 60 days is mentioned and in
the IT Related Procurement PDF the request states 120 days. Please clarify.

See answer to question 2

**UA System Requirements for Accepting Funds**

If payments by the applicant or student will be made directly to the University then they are required to go through the University of Alaska’s Touchnet Gateway or Touchnet Marketplace.

If payments are made to the offeror and then funds are transmitted in batches to the University, the following regulations apply:

*Revenues collected for the university must be deposited in a university bank account within two (2) business days. If a circumstance is presented that’s in the best interests of the university that cannot achieve that outcome there is an internal process to apply for a waiver.*

*In order to limit business process and business infrastructure complexity, which have a measurable administrative cost, the university has a preferred online payments processor. The university favors (gives weight to) companies who become qualified as a TouchNet Ready Partner.*

**Rate Sheet**

The rate sheet is provided as a guide. Please provide a rate sheet that is clear and covers all expenses. UA recognizes that there are many ways to charge for services.

*Use the supplied rate sheet or request an MS Word version that can be modified to reflect the way any vendor may want to reflect the total cost of ownership for the period indicated.*

**Single Solution versus Multiple Solutions**

UAA and UAF do not have a preference for a single instance or multiple instances of the software solution. It is important that
- recruitment records can be kept completely separate (not viewable) between institutions
- business processes can be developed completely independently