

Northeast Iowa Community College RFP Responses

Customer Relationship Management System

Procurement

- Is NICC willing to negotiate any of the obligations and waivers terms with the vendor that is selected for the RFP? ***NICC reserves the right to seek clarification and negotiate with one or more vendors on all terms and proposed costs it deems in its own best interests, including additional provisions not included in this RFP. Proposals that provide alternatives to what is requested in the RFP may be considered provided the proposal meets the goals and purpose of this RFP. NICC reserves the right to make the final determination as to whether or not a proposal meets the goals and purpose of this RFP. NICC also reserves the right to make multiple awards to different vendors or to otherwise split the award of the contract pursuant to the RFP.***
- If a vendor is unable to comply with some of the obligations and waivers listed in the RFP, would you accept a reseller of the technology, like Carahsoft, who can comply with these obligations and waivers? ***NICC reserves the right to seek clarification and negotiate with one or more vendors on all terms and proposed costs it deems in its own best interests, including additional provisions not included in this RFP. Proposals that provide alternatives to what is requested in the RFP may be considered provided the proposal meets the goals and purpose of this RFP. NICC reserves the right to make the final determination as to whether or not a proposal meets the goals and purpose of this RFP. NICC also reserves the right to make multiple awards to different vendors or to otherwise split the award of the contract pursuant to the RFP.***
- If the vendor needs to go through a reseller, like Carahsoft, due to the legal obligations of the RFP and the reseller only allows one year terms, would NICC still consider the vendor bidding on the RFP? ***NICC reserves the right to seek clarification and negotiate with one or more vendors on all terms and proposed costs it deems in its own best interests, including additional provisions not included in this RFP. Proposals that provide alternatives to what is requested in the RFP may be considered provided the proposal meets the goals and purpose of this RFP. NICC reserves the right to make the final determination as to whether or not a proposal meets the goals and purpose of this RFP. NICC also reserves the right to make multiple awards to different vendors or to otherwise split the award of the contract pursuant to the RFP.***
- If a vendor does not originally submit the RFP through a third party reseller, like Carahsoft, but during negotiations determines a reseller is needed, can a vendor bring in the reseller after the RFP is submitted? ***NICC reserves the right to seek clarification and negotiate with one or more vendors on all terms and proposed costs it deems in its own best interests, including additional provisions not included in this RFP. Proposals that provide alternatives to what is requested in the RFP may be***

considered provided the proposal meets the goals and purpose of this RFP. NICC reserves the right to make the final determination as to whether or not a proposal meets the goals and purpose of this RFP. NICC also reserves the right to make multiple awards to different vendors or to otherwise split the award of the contract pursuant to the RFP.

- Are you willing to contract with separate vendors for licenses and professional services - or does the response need to be under only one contract? ***NICC reserves the right to seek clarification and negotiate with one or more vendors on all terms and proposed costs it deems in its own best interests, including additional provisions not included in this RFP. Proposals that provide alternatives to what is requested in the RFP may be considered provided the proposal meets the goals and purpose of this RFP. NICC reserves the right to make the final determination as to whether or not a proposal meets the goals and purpose of this RFP. NICC also reserves the right to make multiple awards to different vendors or to otherwise split the award of the contract pursuant to the RFP.***
- If NICC allows for separate vendor contracts, is the cloud vendor questionnaire required to be completed by each vendor? For example, if a vendor is completing services but not providing licenses, do they need to fill out the questionnaire separately then from the vendor providing the licenses. ***The vendor security questionnaire has been put into place for NICC to fully understand the data security levels that a prospective vendor has implemented in their practice. This questionnaire process applies to any vendor that could have any potential to work with and/or be exposed to NICC data. If working with a vendor for a simple retail transaction only where no NICC data is shared or given access to, this could then be noted at the top of the questionnaire to fulfill the questionnaire requirement. Conversely, if any NICC data is to be shared or given access to a prospective vendor then NICC requires the full questionnaire to be completed.***

General

- In the project overview, the RFP mentioned that the goal is to provide NICC with a relationship tracking solution focusing on student recruitment and communications that allows the college to engage with business as well as students. How do you envision engaging with businesses on the CRM? ***To be determined after implementation. Potential engagement would be with our local school districts, businesses that participate on our program advisory committees and/or offer work based learning opportunities to students.***
- Can you please describe the expectations for the October 2021 Software installation complete date? ***In October 2021 we need a test environment that we can start using to train our CRM Administrator and so that we can start looking at security. We'd like to start setting up and testing the CRM to see exactly how we want it customized. That needs to start in October.***
- Please indicate which of the Software Capabilities are required for inclusion in the

initial scope. **A Required column was added to the [Software Capabilities for CRM document](#).**

- What current software applications are you looking to replace with SMS. **Google Voice, Text Free and EZ Texting.**
- Have you selected an SMS provider, and if so, which provider? **No**
- If SMS vendor licenses have been purchased, (1) did the purchase include integration services into the selected CRM, (2) does the agreement include implementation services? **N/A**

Volumes Marketing

- How many users will need to access the marketing solution. **3-4**
- Roughly how many emails a year will Northeast Iowa Community College need to send on the CRM per year? **75**
- Roughly how many contacts will Northeast Iowa Community College store in the CRM? **Approximately 7,500 - 10,000 prospects; 5,000 enrolled students .**

Social Media

- On the Software Capabilities for CRM sheet, social media is mentioned as a channel for marketing. Can you describe how NICC anticipates using social media as a channel? Would Northeast Iowa Community College like to see a solution that offers social media advertising as a channel for their marketing engagement efforts? **Yes**
- What social media channels does NICC anticipate publishing on? **Instagram, facebook, Twitter, YouTube and LinkedIn**
- How many social accounts does NICC anticipate using? **1-2**
- How many posts per year does NICC anticipate publishing on social media? **Unsure**

Events

- Is event management in scope for the initial project? **Yes**
- What event management platform are you currently using, and is replacement of this solution in scope for this project? **None**
- Please describe the event management processes NICC anticipates running on the selected CRM? **Event registration and confirmation. Possible payment.**
- Can NICC provide an example of the types of events NICC anticipates running on the selected CRM, if any? **Registration for an individual or group campus visit.**

Advancement

- Is NICC currently using a CRM for advancement now? If so, can the college disclose which CRM they are using now? **Ellucian Colleague**
- Please describe how NICC is currently achieving gift processing and what the expectations for gift processing would be on a new CRM? **Paypal**
- Will the advancement solution require gift entry management? **Yes**
- Will the advancement solution require giving pages? **Yes**
- What is your annual gift/giving volume? **900K**

- How many alumni/donor events do you host annually? **3**
- What solution do you use to manage your alumni/donor events? Is the event payment solution native to your event management solution, or Advancement data base? **No**
- How many alumni/donor records do you currently manage in your Advancement/Donor Management system? **1500**
- What is your current system for creating online giving forms, and processing the transactions? **paypal**
- How many users will you require for the Advancement solution? **4**
- Are Advancement users in addition to the user counts provided in the RFP documentation? **2 would be new**
- In addition to the Foundation, what organization(s) would need access to the CRM? **None**

Integration

- What are you using as your identity provider for SSO (e.g., Active Directory, etc.)? **NICC uses Active Directory and our IDM is a platform called PortalGuard by BIO Key. <https://www.bio-key.com/portalguard/>**
- What email system does your staff use? **GSuite**
- Do you already own an integration middleware or have a preferred technology that you would like to use for the integrations? **Informatica is the vendor we are negotiating with**
- Please provide the following information to define integration requirements for each of the required software systems.
 - Describe what you want the integration to do? **Some will only push data into the CRM, some will pull data from the CRM, and some will just push/pull. We want the CRM to be the key to student's that are currently taking classes or potential students.**
 - Does the application have an API or web-services? This is required for integration. **Yes, all systems we are integrating with have an API that we have access to.**
 - Will the integration be one direction (please specify) or bi-directional? **We will have both. Colleague - bi-dirrectional. Lumens - bi-directional. LMS - push into the CRM.**
 - Do you need the integration in near real time, or is a nightly, weekly or monthly update adequate? **Colleague, Lumens, LMS would be near real time.**
 - If the process is a batch process, how many records are likely to be included in a typical data set (e.g., hundreds, thousands, etc.) **For any integrations we do in batch there would be thousands.**
 - Is there API documentation and a knowledgeable NICC resource available for the software system? **Yes, each software system we are integrating with has an administrator that will be working with the CRM administrator to make the integration process work correctly**
- Is there a middleware/integration broker being used currently? **Currently negotiating with Informatica**

- Do you have an integration architecture/strategy in place currently? **Currently no strategy is in place. One will put into place when an integration software vendor is chosen**
- Can you expand on the type of integration support you are looking for? Does the partner need to own all configuration on the CRM side or just assist an existing integration team? **Assistance is what we would like. We would like our Administrator to do the integration but have availability to reach out if issues arise**

Application(s)

- What technology are you using for student applications, and will this be replaced with a solution under this proposal? **Right now our application resides on Terminal Four on our website. The application then comes into a database we designed. We transfer that data to Etrieve and then a Student Services representative adds that student into Colleague.**
- How many applications do you currently have (e.g., non-credit, credit, etc.)? • When an application is received, does it create a record in your SIS automatically or at some future point (e.g., enrollment)? **Credit we currently have 3161. The process used now started 1 year - so we estimate about 4,000 credit applications a year. To get into our ERP an employee enters the application information manually. For non-credit we get about 10,000 students per year. Non-credit do not fill out an application currently - they create their login and signup for classes online.**
- What attachments are required with an application (e.g., transcript, resume)? **We currently don't require any attachments but want this functionality.**

Portal

- Please confirm the audiences that will access the portal. **Current students and applicants. Parents potentially.**
- What is the expected functionality for each of the audiences confirmed above? **Current students: we'd like them to be able to see their current advisor, submit inquiries, schedule appointments, view scheduled classes, and make sure their information (address, phone, etc) is up to date and correct. Applicants - Apply to the college, be able to schedule a meeting with an Enrollment Advisor, and see what steps in the enrollment process they are missing (ISIR not sent to college, payment needs to be made, etc).**

Advising

- How are students assigned to advisors? **Manual assignment based on program speciality areas and campus location.**
- What is the scope of activities covered by advisors? **Outreach to students at point of application, registration, academic advising, retention/at-risk management, degree requirement tracking.**
- How many people and what are the roles of the people (e.g., recruitment counselors,

academic advisors, tutors, etc.) that will be scheduling appointments **Recruitment staff (15), central advisors (10), administrative staff (15)**

- What is the technology that you will be using for the calendars (O365, Google Suite)?

GSuite

- How many types of appointments are available (e.g., tutoring 30 min, advising 1 hour, advising 30 min, etc.) **Roughly 20-25**

- How are appointments allocated (round robin, scheduled with assigned advisors)?

Scheduled with assigned advisors.

- Do they need to schedule walk-ins? **Maybe**
- Are the appointments in person or via web-conference or both? **Both**
- How do you want to have the students schedule (email link, general website, secure portal)? **All of the above**
- What are key metrics you measure today? What can you not measure today that you need to know? **No key metrics are measured today. Would like to know, total appointment volume by staff, appointment times, average length, appointment type (zoom, in person, phone)**

Data Migration

- What data will we need to pre-load, and what system is it coming from?

We will preload from Colleague and Lumens

- Describe the volume and types of records that will be migrated. **Student data, courses, and any advising information in Colleague will be migrated. We expect this to be around 588 MB. Student data and courses will be migrated from Lumens into the CRM. For Lumens this will be around 150,000 records.**

- How many data sources will be involved in the data migration? **We have 7 software applications that we would like to integrate into the CRM**

• How many source tables will be included in the data migration? (e.g. Contact, Application) **We currently do not have a CRM. It is too early to determine how many tables will be used in the integrations.**

• Roughly, how many data points (fields) will be migrated over to the new system for each contact? (Examples of data points include name, email, phone number, program of interest, etc.) **We are not migrating, we are integrating. Again it's too early to say how many fields will be used in the integrations.**

• Roughly, how many records will be involved in the data migration? And/or what timeframe of data will we be migrating (1 year back, 2 years back, etc.)? **Will be determined during implementation.**

• Do you have a current data dictionary or documentation for your SIS? **Yes**

• Do you have a current data dictionary/documentation for the current application system? **Yes**

- Do you have data governance policies in place, and can those documents be shared at the start of the project? **Yes**

Post Implementation Support

- Have you identified who will be the system administrators, and how many system administrators do you expect to have? **We have 1 full time CRM Administrator and 1 backup.**
- Will you be contracting for post-implementation support separately, or do you want options to be proposed as part of this bid? **Please include post-implementation support options in the bid.**

Other

- Please provide more information for your requirement concerning “Compliments and Complaints.” Any additional info describing the desired functionality would be helpful. **A system that allows students to provide positive (compliments) or negative (complaints) feedback to the college about a situation or an experience.**
- Is the college currently using a financial aid system to package scholarships and awards? Is the desire to have the CRM talk to this system and just share scholarship information or replace the current process/solution? **Ellucian Colleague is used to award scholarships and that will continue, the expectation would be to share information to the CRM.**
- Does the college currently have an emergency notification process/solution? **Yes Rave**
- What is your annual application count? **4,000**
- What is your total FTE? **Credit enrollment 5,905**
- How many users will need access to the system? **Refer to the User License information under the Scope of Services section of the RFP**
- How many “Live Chat” users does NICC require? **20**