**Bid #B19-03 – Addenda #1**

**Answers to Vendor Questions**

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| 1. Please advise on how many unique users you have, how many students do you recruit annually and how many named users will you need pricing for?
 | * Outreach and recruitment is a new focus to Palomar College. Active recruitment in the previous year involved approximately 6,500 students (or guardians).
* Approximately 30,000 applications for admission are received annually on a year-round basis.
* Initially 18 named users will be required.
 |
| 1. What are some of the most critical issues with the current recruitment and admissions processes?
 | * CRM and all communication campaigns are being built for the first time now.
* Human resources are low, need to make large impact with communications.
* There is currently no automated recruitment process in place.
* There is no way to track conversion from prospect to student.
* Communications with prospective and current students is not coordinated across departments.
 |
| 1. Total number of applications received?
 | * Approximately 30,000 applications received annually on a year-round basis.
* Applicants’ admit term assignment is flexible. CRM will better define intended term of enrollment.
 |
| 1. What will be the number of Users for the CRM and possible related roles: Full Use, Work Study, etc.?
 | * 1 technical system administrator account.
* 4 full access key user / functional administrator accounts.
* 1 business systems analyst account.
* 6 limited function support staff accounts.
* 3 data entry staff accounts.
* 3 read only “dashboard” user accounts.

Number and type of user accounts may depend on CRM functionality, and may change. |
| 1. Will Palomar need an online Portal for applicants and/or applications since the CCC Application is required?
 | An online Portal is needed for prospects. Applicants will use CCCApply, managed by the California Community College Chancellor’s Office, and integrated with the District’s Student Information System, PeopleSoft Campus Solutions. |
| 1. Approximately how many unique email addresses (contacts) does PCCD include in email marketing campaigns? What is the approximate total of Email volume in any given year?
 | Email marketing campaigns may include as many as 30,000 unique email addresses in a given campaign, however we anticipate a typical campaign will involve an average of 3,000 unique email addresses. |
| 1. How many total systems will need to be integrated with the CRM? How often will data move from CRM to PeopleSoft and vice versa?? Does Palomar have a data flow diagram as to what data, when, and how often that data moves between the various endpoints?
 | Ideally, the CRM will be integrated with PeopleSoft Campus Solutions, enabling communications campaigns with current students. Data exchange or data flow between PeopleSoft Campus Solutions and a CRM system will have to be determined, along with frequency, if not real-time. |
| 1. Is there an estimated number of text messages that will be sent to prospects, apps, admits, etc.?
 | Undetermined.  |
| 1. How many applications do you receive annually?
 | Approximately 30,000 applications received annually on a year-round basis. |
| 1. How many users will utilize the CRM across which departments?  Please breakdown by 1) admin/power users who may need full system access and/or mass communication access and 2) basic/end users and application reviewers who do not need system configuration or mass communication access.
 | * 1 technical system administrator account.
* 4 full access key user / functional administrator accounts.
* 1 business systems analyst account.
* 6 limited function support staff accounts.
* 3 data entry staff accounts.
* 3 read only “dashboard” user accounts.

Number and type of user accounts may depend on CRM functionality, and may change. |
| 1. How many full access users do you anticipate will access the solution?
 | 5 |
| 1. How many “read only” users do you anticipate will access the solution?
 | 3 |
| 1. How many contacts do you estimate communicate with you at least once each year?
 | Unknown. |
| 1. Regarding the following applications, can you provide details regarding what types of integrations you seek for each. For, example, would you be seeking bi-directional or unidirectional data transfer? Can you provide the preferred API type of integration (e.g. API, batch, import template)?
 | API integration is preferred for any/all software applications where needed, although batch can be used if required. Whether bi-directional or unidirectional data transfer is used will depend upon the specific application use case. For example, bi-directional transfer could potentially be used with an interest campaign for current (or recent) students, while unidirectional transfer may be used for prospect campaigns. The ideal solution would offer both data transfer capabilities, along with options for an API or batch integration. |
| * 1. PeopleSoft
 | Refer to general response above. |
| * 1. StarFish
 | Refer to general response above. |
| * 1. Palomar Mobile App
 | Refer to general response above. |
| * 1. Outlook
 | Refer to general response above. |
| * 1. ClockWork
 | Refer to general response above. |
| * 1. SARS
 | Refer to general response above. |
| * 1. Maxient
 | Refer to general response above. |
| * 1. AI
 | Refer to general response above. |
| 1. Like our above question, can you describe how the following solutions are used today at Palomar? We ask as there may be functional redundancies that could be addressed and eliminated.
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| * 1. ClockWork
 | Disability Resource Center Case Management and Appointment Scheduling application – integrated with PeopleSoft Campus Solutions. |
| * 1. SARS
 | Counseling appointment scheduling system – integrated with PeopleSoft Campus Solutions. |
| * 1. Maxient
 | Student Conduct Management System – integrated with PeopleSoft Campus Solutions. |
| * 1. AI
 | System for responding to “frequently asked questions” through an interactive robot interface (“Pepper”). |
| * 1. Any other relevant systems
 |  |
| 1. For clarification, will this be an enterprise-level implementation (across the entire organization) of the CRM system or will the implementation be specific to one or more departments/offices? If the latter, could Palomar verify the names of those departments/offices?
 | Across entire organization. Will begin with an outreach/prospective student focus. |
| 1. Given the many functions available through a CRM system, would you be open to a phased implementation? That is, is certain CRM functionality required to "go live" before other CRM functionality and, if so, could you prioritized such requested functionality if a phased implementation is amenable?
 | Yes, phased implementation is preferred, beginning with general Outreach functions. |
| 1. What are the three most important goals that Palomar seeks to achieve through the implementation of a new CRM system?
 | 1. Creates prospect database and allows for complex, targeted, personalized and auto-generated communications plans.
* Allow to collect information on how students are interacting with our college
* Where did we meet them? At which events? How often?
* How do they react or click with in email communications?
1. Creates strong dashboards to report on current status of prospective students.
* Traditional admissions funnel
* Reporting high level data to administration
* Varied filtering options to create individualized reports
1. Ability to grade and qualify prospects.
* Grade: Use of existing data to assess likelihood of enrollment (Quantitative)
* Qualify: Ability to use soft information to gauge interest (Qualitative)
 |
| 1. Regarding constituent communications through the CRM system, what do you want to accomplish that your current methods of communication with constituents (students, staff, prospects, etc.) do not accomplish to the satisfaction of the university?
 | This will be the first time communication campaigns will be designed for prospective students. Campaigns will be both engaging and informative, driving students to apply and/or to follow through with procedures for admissions or enrollment. |
| 1. After receiving vendor replies, can you inform us as to what will be the next step in the decision-making process for this potential procurement?
 | The Purchasing department will determine the three (3) lowest bids and turn them over to the bid review committee who will review the submittals and choose a vendor to award to. |
| 1. Can Palomar make available to vendors a list of stakeholders who are (or who will be) involved in the procurement evaluation process?
 | Refer to “Information For Bidders – Specific” item 15 in Bid Documents regarding bid evaluation. |
| 1. Regarding application-to-database compatibility, from which type of database or databases (Oracle, SQL, etc.) will the CRM need to pull its data?
 | Oracle.Importing data from MS Excel into the CRM may also be required. |
| 1. Does Palomar have a grace period or an official procurement policy regarding how the university handles vendor RFx replies that have had their timely delivery (via, for instance, courier) delayed/interrupted by sudden bad weather (blizzards, floods, acts of God, etc.)? If so, can you provide details of your grace period or your policy?
 | There is no grace period. Bids received after the deadline, will not be opened. |
| 1. Can you verify the desired (or expected) length of the contract for the CRM system?
 | 3 years |
| 1. Has Palomar released any addenda for RFP #B-19-03? If so, will those addenda be sent to the vendors or will vendors need to check the Palomar site regularly for those addenda?
 | No, vendors will need to check the website. |
| 1. We see that only one original of vendors’ proposals is to be sent in response to this RFP. Are we correct, then, to conclude that Palomar does not also want any electronic copies (i.e. PDFs)?
 | Electronic copies are not required but are appreciated. |
| 1. Whether companies from Outside USA can apply for this? (like,from India or Canada )
 | Yes. |
| 1. Whether we need to come over there for meetings?
 | No. |
| 1. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)
 | Yes. |
| 1. Can we submit the proposals via email?
 | No. |