**Q & A Addendum 1**

**RFP No. R722701**

**Salesforce Platform Consulting Services**

**Questions received from potential vendors**

1. Can you describe the system(s) that are currently in use for storing and managing Student Lifecycle data?

* PeopleSoft is the University’s current SIS, but we have begun a development project with Workday to launch in the next year or two. PeopleSoft is the official record: enrollment, grades, bio data, billing, financial aid, etc.
* Salesforce is used for inquiries/recruiting/application tracking/interactions (appointments, emails, calls, etc)/employment history/current academic term data
* SLATE is the official record for the application and document storage
* Perceptive Content is the university’s online storage system for past applications and current student documents
* Random shadow systems: spreadsheets, etc.

2. What is the data strategy University of Arkansas currently has in place for dictating how and when Student Life cycle data is updated?

Student data is updated in two ways with varying frequency. Firstly, externally sourced data (e.g., SIS) I updated no more frequently than every 24 hours, in batch through data integrations described in later questions. Some externally sourced data will be updated on a less frequent basis, based on the volatility of changes to the external data or need. Secondly, internally sourced data (e.g., through interaction with students and stakeholders) is updated at the time of information awareness.

3. Are there any other Salesforce systems currently in place?

The Walton College has one instance of Salesforce. Other colleges/departments on campus have used SF in the past. Any current usage outside of Walton is beyond the scope of this RFP.

4. What structure is in place to manage the current Salesforce instance? For instance, is there a specific department that is handling enhancements and technical support, if so, will the vendor continue to engage these resources throughout the design and implementation process?

Oversight of the Salesforce environment – to include technical support and data integrations – is handled by staff of, currently, two data system specialists.

5. What is the current process in training end users around Salesforce and other systems, such as WorkDay? Would a formal change management process be needed in addition to the direct technical support?

Training is done-in house as OJT depending on functional roles. We also work with program coordinators/staff on training for their interactions. From a graduate school perspective, I do not see this changing. The ultimate needs of the final design phase and implementation will influence the need for change management processes and formalized training (e.g., what additional college functions are determined to be beneficial in SF).

6. Our staffing process assigns resources to an account once the sales process is coming to a close. Per the proposal requirement to provide narrative biographies of project team members, would it be sufficient to, instead, provide a description of key qualifications, experiences, and certifications that would be expected of the assigned resources?

Yes, given the narrative reflects the strengths that the team members, which will be assigned, bring to the project.

7. In the scope of completing and assisting with current troubleshooting efforts, are you using APIs for integration to Slate's open source platform? Is the unidirectional integration realtime or batch or both?

SLATE is a web service and data flow can be either uni- or bi-directional and utilizes flat files. Our current SLATE consultant advised that API-like processes can be built as needed.

8. What is the current estimated number of tickets in the backlog of work for issues related to the Outlook sync that you are working to resolve?

The Outlook sync continues to be an ongoing and evolving and inconsistently replicated issue for all college SF users. It is not a matter of individual tickets but rather the overall process that needs to be addressed. I can sync email one week and then not the next. Same applies for several, yet not all, members of my team. This is a critical function that needs to be a priority.

9. Are offshore technical resources permitted?

No data can be stored on systems outside the US. However technical resources can be offshore, as long as no data is stored offshore.

10. What is the anticipated timeframe of the RoadMap that will be built during the design development phase in years or months?

We are open to beginning the design phase in January if the RFP selection process allows for that timing. I would anticipate this phase be anywhere from 2 – 4 months in planning.

11. Does the planned Workday SIS rollout impact faculty in the graduate school only or does the planned integration include faculty and/or working students at the University level?

The future Workday SIS will be at the university level and impact all student and academic operation data sources.

12. How many systems currently integrate with Salesforce for the graduate school?

* PeopleSoft, Outlook, Pardot, Apsona, Formstack, Azure SSO
* Looking to connect to SLATE in the immediate future and eventually Workday as allowed by the University

13. Are high level SMEs outside of Salesforce currently engaged for support of existing integrated systems?

Each system has their own administrative oversight office, depending on scope and function of the system.

14. Given past Salesforce scoping efforts, what is the anticipated timeframe to complete the scope of work within Walton College?

The design phase (focus of this RFP) must be completed within the time frame for review and implementation of final design to be live based on operational needs below.

* For the Graduate School of Business, the new iteration of SF would be designed and implemented by August 2020.
* If a graduate application is deemed necessary as part of the development, this component would need to go live by August 1 at the latest.

15. Are you considering the Salesforce Higher Education Data Architecture (HEDA)model?

Yes, within the confines of ensuring best possible design for stakeholder needs.

16. What is the sole unique identifier - currently used as the single source of truth for student ID? Does this stay with that person throughout their journey pre/post academic experience?

A student ID is unique to a student after matriculation and is static (some exceptions occur). Prior to matriculation, applicant IDs are utilized and reconciled with contact information as needed.

17. How are student milestones currently managed? \*(ie applicant, admit, matriculated, current, alum, giving, etc)

* Students currently apply within SLATE and the application through admission and notification to the student are housed solely within this system
* Data is then uploaded to PeopleSoft from SLATE to matriculate and enroll students
* We use SF as a shadow application system since we are still prospecting within SF, Pardot is a significant factor in this alignment
* Current student academic data is housed within Peoplesoft and term data is synced with SF on the 11th day of each term
* No grad academic advising module exists and is an element of the new design goal
* Alumni contact records continue to reside in SF but there is no active Alumni functionality, also a new design goal
* I am not aware of development’s needs as related to this project, but they should be a consulted in the design phase

18. Have you clearly defined the holistic process flow to manage Admissions, Financial Aid, Career Services, Alumni Relations, Donor Management?

* Financial aid is a university role and will not interface with SF
* Development’s (Alumni Relations/donor management) needs have not been defined at this time and will be a potential expansion based on constituent interviews (see #33)
* We are looking for a vendor with significant higher ed implementation experience to help guide the holistic process flow with best practice examples

19. Is this initiative undergraduate focused or university wide?

The scope of this project is for college-wide operational data as well as graduate business school student data.

20. Can you share data arch diagrams of current status?

At this time, we cannot share architecture diagrams beyond the narrative descriptions provided in these questions.

21. What is used for event management and how is it integrated?

* Currently campaigns are created and populated in SF. The event is then created in Eventbrite and participants register through this third party. Data is then uploaded into SF and the campaign updated to track actual participation.
* This is another priority for best practice advice.

22. What is the primary reason / objective for implementing CRM? Efficiencies, Student Experience, Metrics?

Efficiencies, automation, data collection/integrity, communications, central access to data and process

23. What are your greatest pain points around admissions process? (ie campus tours, website navigation, financial aid, etc) Are there any others?

* Having multiple systems involved in the admissions process is the largest pain point.
* We do not have control over the central graduate application process in SLATE
* We are looking to take control through our SF implementation to then interface with SLATE

24. What are your greatest differentiators that you compete best with and how are you using those assets in your marketing communications?

* Regional business education leader in a dynamic business environment with most of the Fortune 500 companies present – feeds into faculty research, development, business connections, internships, job placements, etc.

25. What are you doing to compete in the digitally disrupted landscape of MOOC's and on-line learning in general?

* We do not see MOOC’s as competition, nor do we have significant regional competition.

26. How will this CRM initiative support future UA roadmap planning?

This SF instance will not support the UA. It is a college-specific CRM solution.

27. Is there a need for event management?

Yes, see #21.

28. Is there a need for a recruitment system?

Yes. Recruitment is currently managed through SF and Pardot, and we do not anticipate this changing. Best practice advice on enhancements/workflow is requested, specifically focusing on possibility of “leads”.

29. Is there a need for a donor management piece?

See #17 and #18.

30. What type of marketing are you looking to do? (Ads, Email, etc.)

Broad spectrum, omni channel marketing through our current license with Pardot

31. Are you currently in Classic or lightning?

Classic.

32. What do you currently use Pardot for?

Digital advertising landing pages/forms, automated communication plans and some workflow

33. You mentioned an on-site consultant, are you looking for full on-site support at your location?

* On-site support needed during constituent interviews and design planning and throughout implementation as needed.
* Technical support can be remote.

34. We have international Higher Ed references and domestic Non-profit references. The language of the references requires higher ed references within the continental united states. Please advise if we should still consider submitting our response for your consideration.

The reference requirement of 3 AACSB accredited schools of business could span international contexts, as AACSB is a worldwide accrediting body. Any substitution of US-based flagship public and/or R1-level classifications with those of top-tier public institutions abroad, should include a narrative justification in the reference. Additionally, non-profit references could satisfy the requirements for references in architectures, packages, and services.

35. Question submission deadline – We respectfully request that UA provide answers to questions on a rolling basis prior to the last date UA will issue an addendum, 11/18/2019.

Answer: All questions will be addressed upon the release of the addendum no later than 11/18/2019

36. Hogbid solicitation page – Hogbid currently lists a Closing Date of 11/20/19. Please confirm that the proposal submission deadline is 12/04/2019 at 2:30 PM CST, as stated in Addendum No. 1.

Answer: All dates referenced in Addendum 1 supersede dates listed upon original RFP

37. RFP Cover Sheet, Signature Required for Proposal and Standard Terms and Conditions Cover Sheet, Signature Required for Response – Please clarify which form vendors are to submit.

Answer: Both

38. Standard Terms and Conditions (p. 4) states: “IMPORTANT: Respondents must address each of the requirements of this bid request which is in the format of a Request for Proposal.” RFP section 9.2 states: “Respondents must address each section of the RFP. [redacted for space] In the event that a detailed Proposal is not necessary, the Respondent shall state ACKNOWLEDGED as the response to indicate that the Respondent acknowledges, understands, and fully complies with the specification.” In the interest of providing a streamlined response that facilitates evaluation, may vendors address the requirements of the RFP as opposed to addressing/acknowledging each section of the RFP?

Answer: Since this will be a detailed proposal, any vendor submitting a proposal will be acknowledging all sections of the RFP in the submission of the RFP response.

39. Section 2 Scope of Work – Which ETL/integration tool is available for data integration configurations? Please explain how UA will be involved with integration configurations. Considering in-process and planned SIS and application rollouts, please confirm the relevant source and target systems that UA has identified for integrations.

The two primary tools used in data prep/cleanse/integration are SAS Enterprise Guide and Rapid Insight Veera Construct. These tools are augmented by Python and PowerShell scripts for Salesforce API/Dataloader upsert/insert.

40. Section 2 Scope of Work – Please elaborate on any identified or desired communication strategies to be executed with Pardot marketing automation.

See #32

41 Section 8.17 Warranty – How would UA like consulting services partners to respond to these software-related warranty items?

Please see answer to question 43.

42. Appendix II: Official Price Sheet – Has Salesforce separately provided software and software-related annual maintenance costs and pricing to UA?

Salesforce licensing and costs will be handled separately through a pre-existing contract.

43. How should consulting services partners provide a response to these software-related cost line items?

Any proposed additions to the current Salesforce contract/costs shall be approved and managed directly between Walton College and Salesforce and will follow the design phase which is the scope of the current RFP.