



# THE CITADEL

<b>Solicitation Number</b>	<b>RFP 23007-JM</b>
<b>Addendum #</b>	<b>1</b>
<b>Date Issued</b>	<b>01/30/2023</b>
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## **SOLICITATION TITLE: RFP 23007-JM Constituent Relationship Management**

### **TYPE OF ADDENDUM:**

- Change or clarification to the Solicitation's specifications, requirements, or scope of work.
- Questions posed regarding the Solicitation and their respective answers by The Citadel.

### **Questions:**

1. Whether companies from Outside USA can apply for this?  
(like, from India or Canada)

A. No.

2. Whether we need to come over there for meetings?

A. No.

3. Can we perform the tasks (related to RFP) outside USA?  
(like, from India or Canada)

A. No.

4. Can we submit the proposals via email?

A. No, Please submit as required on page one of the proposal request.

5. To conclude, I actually have one initial question from the RFP that I did not see listed. In order to derive accurate pricing, I will need to know how many internal users will need access to the new CRM? Please include users at all levels including end users, managers, and administrators.

A. Currently, we have one system administrator and 10 power users.

The rest of the admissions staffs (cadet admissions is on office and Graduate/transfer/veteran/study abroad is another office) do the application file review and many other tasks (set up events, do adhoc communication, track data, run custom reports) – there are 35 additional users in this category.

In addition, we expect 60 basic users (faculty, advisors, deans, student workers). This includes access for our Cadet, Graduate Student, and Veteran student tele-counselors who need individual accounts so we can report on their effectiveness. Currently they share one login – it is very archaic, gives us no ability to track results, and is very unsafe.

6. Are ink signatures required? If so, would a scan of the ink signatures as a substitute be acceptable?

A. No, scanned signatures are acceptable.

7. Prior to awarding a vendor, is The Citadel planning to schedule demonstrations with more than one vendor following the RFP proposal due date?

A. YES, possibly as needed.

8. 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?

A. See Answer in #5

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

A. See Answer in #5

10. 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?

A. Yes, we would need access by admissions staff and student staff – up to 50. Would also consider a non-live chatbot as an alternative.

11. Are you interested in non-live chatbot? This chatbot performs multiple tasks, saving staff time and going well beyond simple questions and answers. This assistant answers questions and can route the conversation to a live person if needed and create follow-up help tickets.

A. Yes, we would consider a non-live chatbot.

12. Do you have a timeline already in mind for your implementation (i.e. when do you expect to go live)?

A. We would like to go live Mid-August 2023 with Application portion and some basic communication workflows and then have full usability by January 2024

13. Is file-based batch integration acceptable for integration with Ellucian Banner?

A. Yes, but with a preference for native integration or an API

14. Do you currently use texting software? If yes, what is the system and do you intend to continue using it?

A. We currently are Cadence/Mongoose users. Would prefer a CRM that integrates with a texting software that we can track interactions. The current systems are stand-alone and do not talk to each other. We want to get away from this current limitation.

15. Please clarify your requirements / expectations for Social Media Engagement.

A. We require the software have the ability to track interactions from social media posts and the ability for those interactions to be added to prospective student and or applicants record. Preferably, that this be an integrated system process, not a manual upload.

16. Please clarify / define what is meant by "responsive design"

A. We are referring to responsive design as an approach to web design in which the interface adapts to the device's layout, facilitating usability, navigation and information seeking. Responsiveness is possible thanks to media queries, allowing the design to adjust automatically to the browser space to ensure content consistency across devices, and design elements being sized in relative units (%) [What is Responsive Design?](#) [| IxDF \(interaction-design.org\)](#). Our current system is designed to be viewed on a desktop – it makes it very difficult for basic users and our students to interact with the system on a mobile device.

17. Do you have a change management plan already in place? Will you be seeking change management services as part of this RFP?

A. Will consider change management services as part of the RFP if they are available.

18. What are you envisioning for project team staffing?

Will this be work on top of their day-to-day responsibilities? YES

Will they temporary backfilled? We are looking to hire additional staff to assist with the implementation and roll-out, preferably enrollment/admissions people who have previous experience with setting-up CRMs

Will you have a dedicated Project Manager assigned? YES

Will you have a dedicated CRM Administrator for this project? If so, is this an IT resource or functional area resource? YES, the resources is a former IT resource with programming experience that is currently 100% assigned to the functional area and currently is the CRM Administrator for the current system.

A. See answers directly above.

19. Will you have a training department responsible for training end users on an ongoing basis?

A. No – ongoing training will be done by System Administrator and 2 Senior area functional users who are the senior power users.

20. Do you use Office 365 or G Suite?

A. Both – Faculty/Staff Office365      Students – G-Suite

21. What data visualization tool are you currently using on campus (e.g. PowerBI, Tableau, etc.)?

A. Cognos

22. Do you intend for the awarded vendor to teach you how to configure for you and the vendor to share the configuration? Or, do you expect the vendor to do all configuration?

A. Vendor to teach CRM Administer and Power users the configuration while the vendor leads the initial configuration.

23. How many users will be admins/power users who may need full system access and/or mass communication access?

A. See Answer to question #5

24. How many users will be basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access?

A. See Answer to question #5

25. How many applications does The Citadel receive annually at both the graduate and undergraduate level?

A. Graduates: 1500; Undergraduates: 1500; Cadets: 6500 (traditional HS and transfer students but a different student group for us than our other undergraduate populations).

26. Section B. SPECIAL INSTRUCTIONS - CONTENTS OF OFFER (RFP) - SOLUTIONS BASED (JAN 2006): - item 3.2.4 Services included in the proposal and otherwise available – can you please clarify the request in this area? Is this related to services for installation, post go live, training, etc"

A. Please provide any additional services you may provide that are not specified/listed that may assist in implementing a successful solution.

27. B. SPECIAL INSTRUCTIONS - CONTENTS OF OFFER (RFP) - SOLUTIONS BASED (JAN 2006): - item 3.2.7 Technical and operational manuals, by reference - do you mean to include any training manuals or other documentation on the MSFT solutions?"

A. Yes, we are referencing technical and operational manuals for training and continued support of the solution. This is information for the CRM administrator and other super-users to be able to reference as they use the system on a daily basis, but may need additional information in performing their jobs.

28. Can you share what the functionality expectations are to support travel management?

A. The module supports the recruiting staff in building a recruitment trip to track where they went and the success of the trip. The trips are sharable information so that people back on campus know where people are. Trips management should allow for the aggregating of multiple events, applicant interviews, notes, and flight/hotel information in a one-stop environment. Events and meetings are displayed on a map and details are easily accessible by a staff member. Points of interest can be searched from directly within a trip map and then added as a stop on a trip pulling up details about the site (high school for example), address, counselor contact information, historic application data from that site to assist the recruiter. The trip is historically kept in the system and accessible by role – not just tied to the person on the trip so that when that recruiter moves on and no longer has an account, the data disappears. The data on the trip needs to be kept historically for the office to access.

29. Can you please list the count or number of end users and by type?

A. See answer to #5

30. Can you please confirm what internet site notices including amendments and answers to questions will be posted?

- We have checked <https://scbo.sc.gov/search> as specified on the submission form, and do not see any entry related to the subject RFP.
- We have checked <https://www.citadel.edu/root/procurement-vendors/solicitations> as specified in section **AMENDMENTS TO SOLICITATION (JAN 2004)**;, where only the original RFP PDF is listed.

A. All addenda/amendments will be posted to the following: <https://go.citadel.edu/procurement/vendors-and-suppliers/solicitations/>

31. Do you have any other CRM technologies?

A. Not on the school side of the Citadel. Our Alumni and our Foundation have CRM technologies for alumni and donors. Those systems do not integrate with any other Citadel CRM technology.

32. What communication (SIS) system do you currently use?

A. Ellucian Banner

33. What project management methods have worked well for The Citadel in the past?

A. In implementing new software, we have used a combination of Agile and Critical Path. Basically, we have small team of key players who work the implementation plan with one person on the team (and often in tandem with the software vendor's client manager) who keeps the project on schedule.

34. Will there be a dedicated project manager to support this project?

A. See answer in #18

35. Is there an incumbent vendor?

A. Ellucian Recruit

36. Is there a budget defined and approved for this project?

- A. We have not set a limiting budget for the CRM, although cost will be considered; ultimately, the institution is committed to finding the solution that meets our requirements most closely.
37. How many stakeholders or teams across the institution are expected to have an ownership voice in this project?
- A. Three: Enrollment Management is the key stakeholder, but is partnering with and supported by IT and our Marketing Department.
38. Is there a desired date by which the work should be completed?
- A. See answer in #12
39. How many user logins are required?
- A. See answer in #5
40. Please confirm the personas or login profiles - Students, Faculty members, Staff, IT admins and Scadea team (for maintaining the system)
- A. See answer in #5
41. Communication channels as requested are Email, Text (using ISPs), calls. Do you have any further communication channels?
- A. Chat feature
42. For postal mail communications we need to integrate with external service providers like USPS, FedEx and DHL. Please suggest your preferred vendor.
- A. USPS
43. Postal mails shipment should be international or only national? And do you need a tracking for it?
- A. National. Tracking stops at noting a print piece was mailed. No delivery tracking required.
44. Do you have a separate department to send postal mails to the students?
- A. Yes, an on-campus post-office. We also dropship through various print vendors and will need to track that the pieces were set-up and sent to be mailed by the external vendor.
45. What are the various channels you use to create prospects?
- A. web, social media, list purchases via various vendors (college board, ACT, etc)
46. What kind of transactions will be processed through the payment gateway (e.g., one-time payments, digital payments, recurring payments, subscriptions, etc.)?
- A. One-time payments: The application fee. The school has a payment gateway that the system must integrate with which is a state requirement: SunTrust Merchant Services (STMS).
47. For Chat functionality, do you need specific routing capabilities for routing it to correct agent based on logics? Do you need a knowledge article as well? Are you planning to follow standard ITIL processes for incident management, problem management and service request or simple flow of case management is fine?
- A. The Chat function is to support applicants who have specific questions about the school and the application process. The function will need to route questions from prospective cadets to cadet admissions and questions from other students to the Graduate & Transfer Student Office. Yes, we will need knowledge

articles as well as part of the Chat function. This is not a chat function for incident or problem management nor for service requests. This is not a ticket based system like those used for IT problem management.

48. How do you differentiate between prospect and inquiry?

A. A prospect is a “cold” lead: names acquired through vendors or recommendations. An inquiry is a prospective student who initiated contact: signed up for a tour, sent us an email, followed a QR code to a form and filled the form out, spoke with a representative at a high school fair, etc....

49. What is the life cycle of inquiry and admission? How is it different from Prospects, applicant and enrolled?

A. Students can enter the life cycle at a number of points, but the flow is: Prospect, inquiry, applicant, admit, deposit, enrolled

50. For cadets what are the various courses offered? And how are programs defined for them?

A. [Undergraduate Majors & Minors - Academic Resources \(citadel.edu\)](http://citadel.edu) Cadets can declare any major/program during the application process. They can also change majors multiple times. Cadets are admitted to the school, not to a specific academic program/major.

51. What is the standard program structure for the courses offered by the institute/university? (Number of subjects per semesters per year, selection of electives and majors)

A. for undergraduates: 8 semesters; 15-20 credit hours a term. The admissions CRM we are seeking does not interface with registration and is not part of how students choose classes.

52. For email communication do you need integration with outlook or agents will work on the new system?

A. We are looking for a CRM solution that offers bulk email capability. Our current system does use the school’s outlook servers to deliver email.

53. Do you have a complete student journey from a prospect or inquiry to an alumnus? If yes, can you please elaborate.

A. We have pieces of the journey identified from Prospect to Matriculation for Cadets. We do not have the student journey for other populations clearly identified nor mapped.

For instance: Prospective Cadets are high school students interested in a challenge, who participate actively in competitive sports or JROTC, who are looking for structure in their educational experience, and who are interested in the personalization that a small school education brings. We tie our marketing and our recruitment stories to this and use this information to identify prospects from sources like the College Board and ACT. We also know high return activities at various stages of the admissions funnel, like attending an overnight visit indicates a student is 68% more likely to enroll than a student who does not attend the same event.

54. Can you briefly explain the event registration app flow?

A. An Event module allows us to create on and off campus events that either have open invitations (anyone can register) or closed events (specific type of student can register ie: admitted students). The flow of activities goes something like this: create an event that is publishable on the web to be viewed by anyone or published somewhere with a specific link that goes to specific population, invite attendees to events by using event templates. Students register for the event. We need the ability to collect a registration fee if applicable to the event. Registrants receive a confirmation. We can use the registrations to send multiple communications pre-written and pre-scheduled to include reminders and other pieces of information pre/post event, we are able to monitor registrations, run lists to share with colleagues, track activity in the system including who attended and who did not.

We also need the ability for some events to be on-going/repeatable. Typically that is the ability to set information for daily tours with limits of how many people can attend. We host 10 tours a week, typically, but there are weeks around holidays where we change the tour schedule. This needs to be a feature to easily allow us to set days and times without changing other information.

55. What type of training requirements you have? (Onsite, online, recorded, documentation/articles, etc)

A. We are looking for assistance with configuration that will include training as part of the set-up and then access to continued training: online seminars, recorded information, training manuals, etc....

56. Do you have any performance or scalability (Non-Functional) requirements?

A. No

57. Do you have any specific Oauth or SSO service provider you need? Like Okta, Microsoft AD, etc

A. Microsoft AD SSO

58. How are prospects created in the present system? Are you open to do small modifications in the present process?

A. Prospects are created via batch uploads from lists as well as individually created. We need the ability to create them both ways. We are open to small modifications to the load process as long as both options are available to us.

59. Do you wish to have any specific Email Templates for Thankyou screens, Confirmation Messages, Acknowledgement Emails?

A. Yes – we expect email templates, thank you screens, and confirmation messages to be part of the communication platform and they need to be configurable by the power users.

60. How is the existing data currently stored? And what are the technologies or external systems presently used? Will the source of truth for the data will be changed with this implementation or we will continue to use the existing systems?

A. Data is currently stored in the cloud hosted by the vendor. The CRM must be able to talk with Ellucian Banner to transfer student data upon admission, share documents that must be uploaded into Ellucian BDM (ie: high school and college transcripts). We also must be able to import data from Common App as well as standard file uploads from vendors such as the College Board, and ACT.

61. How much data needs to be migrated and what is the size of the data set? How you are expecting the data be transferred to the new system (e.g., manual import, automated data migration tool)? What is the frequency of data loads? (One time, daily nightly job or real time)

A. We need a data migration tool that will be transferred from the current system into the CRM. We currently have 1 million prospects and 30,000 applications from the past 3 years that we need to keep. We purge our information 3 years after the application year is complete unless the applicant enrolls at the institution. Prospects and inquiries stay in the system until 3 years past their application year (the year they would have completed high school – or 3 years after what would have been their start term for graduate school).

62. What are the other systems that the new applications should interact of integrate with?

A. We import data from Common App as well as standard file uploads from College Board, and ACT. As new sources for potential students emerge, we will need to have the ability to interact with those vendors.

63. Do you have a set of common questions that chatbot should answer?

A. No, we will be building the chatbot function going into next year's recruitment cycle.



64. what are the various campaigns do you have? Do you want the campaign hierarchy to be in place for structured approach? Also, for the campaigns do you have percentage of sales assigned to sales rep? And do you track campaign members for influencers? Forecasting report is also needed every quarter?

A. We need the functionality to build our own campaigns including the communication flow associated with each campaign ie: Junior search, senior search, cadet applicant, graduate MBA student applicant. We need territory management – the ability to assign certain type of students ie geographically or by graduate program to different admissions counselors. And we want to track results (applications to enroll, etc...). Cadet recruitment is on a 12-month cycle. Transfer and graduate recruitment is typically on a 6 month cycle. We do not operate on quarters. Yes, we would like to track campaigns for Influencers: for us that would be parents, guidance counselors, JROTC instructors, HR departments at companies.

65. For storing documents so you have any existing system? Do you want to have a new system or integration with the existing will be fine?

A. Hard copy and digital transcripts are stored in Ellucians' BDM system. Other files need to be stored in the cloud hosted by the vendor ie: pdf of the application, electronic letters of recommendation.

66. For event management app, bar code generator and scanner needed. Do you need to integrate it with the external devices like printers or scanner devices?

A. No, not needed to be integrated with external devices like scanners. Must be able to print from the system to create attendance lists, reports, etc....

67. How does The Citadel plan to provision system users for administrative staff members, teachers, and/or students?

- a. i.e., should the members of the administrative staff log into the system with expectations of having unrestricted access (adhering to the necessary organizational and functional permissions hierarchies) while the teachers and students have a more focused experience?

A. The system is expected to be role based.

68. Does The Citadel plan on working with entities that should/would have access to the system?

- a. i.e., would “partnered” school systems where The Citadel and that public/private school system need the ability to log into the same system to collaborate on initiatives, programs, or other forms of partnership?

A. No

69. How does The Citadel envision the student’s lifecycle, and does access at each stage of the lifecycle change?

- a. i.e., Will only actively enrolled students get and receive consistent access during the school terms? Do alumni get access at all, and if so what does that look like?

A. We do not expect students to access the system after they matriculate. This system is in support of the application process for new students. No alumni access.

70. Does The Citadel have an expectation of user volume?

- a. i.e., 20,000 people need access to the system. The demographic of the 20,000 users breaks down as follows:
  - i. 200 administrative/The Citadel staff members
    1. 10 users are responsible for outreach communications and initiatives
    2. 190 are focused on student engagement
  - ii. 19,500 students and alumni require access
  - iii. 300 teachers



A. See Answer in #5 and #27

71. Which social media platforms does The Citadel use, how many accounts on each social media platform, and how many of those accounts should be connected with Creatio/the system?

A. We need to tie digital activity from the main institutional social media sites managed by our marketing department. There will only be one account per social media platform. We need the ability to add additional social media platforms as the world of social media evolves. Currently we are using: LinkedIn, facebook, tiktok, youtube.

72. Does each social media platform get used with a specialty in mind, or are they used in more of a “broadcasting” fashion where the same message gets shared across all channels? i.e., “Facebook publishes event-related information; Twitter is more interactive with individual students and the community; etc.”

A. They are used with a specialty in mind. LinkedIn works well for graduate students, youtube and Instagram for cadets and undergraduates, facebook for influencers like parents and guidance counselors.

73. What other systems (beyond what was disclosed in the RFP) do The Citadel use to manage its operations? One of Creatio’s many strengths is its ability to consolidate/connect disparate systems. The more we know about other systems, the more we can highlight Creatio’s unique value proposition and how its ability to bridge gaps in systems that create inefficiencies in processes.

- a. Examples of other systems might include, but aren’t limited to:  
Financial accounting system (aka “ERP”), email management (i.e., “Microsoft 365, GSuite, etc.”), social media planning tools (i.e., Hootsuite), etc.

A. Ellucian Banner is the ERP for the institution. We are a microsoft365 system for faculty/staff and Gsuite for students. See answers to #14 and #46

74. Can you share your overall strategic vision for the new system and how it fits in with the vision for The Citadel?

A. According to the Center for Education Policy Research at Harvard University, up to 40% of prospective students drop out before school starts because of difficulties with the admissions process. On a similar note, two-thirds of high school students report that social media communications impact their decision on where to enroll in college. In other words, if an institution is not actively leveraging social media for admissions, it’s missing out on a pool of potential recruits.

The Admissions/Recruitment Customer Relationship Management (CRM) system has one goal: to create more valuable customer relationships with their future students. This is done by supporting every function of the admissions/recruitment process: engagement with prospects, marketing automation, reporting and analytics for operational assessment, manage inquiries, manage recruitment events, streamline the admissions and applicant evaluation process, integrate with the school’s website and social media channels, while addressing security and data protection.

The CRM will allow the Citadel to streamline processes, modernize communication, and manage data more effectively in order to enroll the best students seeking a Citadel education.

75. What do you use for marketing solution today? Who uses it and how is it used?

A. See answer in #35

76. What is the current system of use for Constituent Relationship Management? How many years of data/records would be included in the data migration?

A. See answers in #35 and #61

77. Do you have an automated system that currently handles print and mailing?

A. No. See answers in #42, #43, #44

78. How many internal users will be accessing the system and what departments these team members reside?

A. See answer in #5

79. How many applicants do you receive each year?

A. See answer in #25

80. Can you confirm the student population is between 3600 and 4000?

A. Yes

81. Please describe your current technical support team. How do users both internal and cadets/graduate students get access to support?

A. We have a help desk for faculty/staff and we have a help desk for students. There is an online ticket system to report issues.

Other Change: Describe

**IMPORTANT NOTICE:**

X Contractor is required to acknowledge receipt of this Addendum by signing below and returning a copy with its Offer.

Except as provided herein, all terms and conditions of the Solicitation referenced above remain unchanged and in full force and effect.

**SIGNATURE OF PERSON AUTHORIZED TO EXECUTE ON BEHALF OF OFFEROR**

**Signature:** \_\_\_\_\_

**Printed Name & Title:** \_\_\_\_\_

**Company Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_