EAP RFP
Addenda re: Questions/Answers

Q – The RFP indicates "Information submitted independent of the response document…will not be considered by the Committee." May we include our standard documents, in addition to the bid response form and schedules B & C, as one .DOCX or .PDF document?
A – Absolutely. Please complete the following in the format provided: Request for Proposal Form, Schedule B – Bidder References, Schedule C – Rate Bid Form. Other information to support this is welcomed.

Q - Should the clients' referenced services be within the last (3) years even if we feel another reference would be better aligned with King's University College?
A – The references provided in Schedule B should be within the last 3 years. If you would like to include other references in your extra supporting documentation (especially references from the Canadian PSE Sector), that would be welcomed.

Q – On the Schedule C – Rate Bid Form, should the five-year projection of associated operating expenses (post implementation) include the annual license fee?
A – Yes – Please include annual licensing fees (assuming the number of licenses will remain at the same level as initial implementation for the purposes of providing a five-year projection).

Q - May we include our standard cost information document with the bid submission?
A – Absolutely. As long as you pull the pertinent information out of this and submit it in the Schedule C – Rate Bid Form format as well.

Q – On the Attachment 2 – Scope of Opportunity - Phase I Success Factors, should we provide content/answers for each bullet point beginning with 'Phase I Success Factors:.' Would the Committee be amenable to this bid response format?
A – Yes, that would be acceptable and clear. As long as the bid contains the information needed for the Selection Committee to evaluate appropriately, any format is accepted.

Q - On page 13 we understand "Canadian Post-Secondary Education" refers to public universities, colleges, community colleges, polytechnics, institutes, university colleges. Is our understanding correct?
A – Correct. Note that King's University College is affiliated with Western University (a public University).

Q - This proposal appears to be written for selection of a CRM platform. I am confirming that you are seeking a response from an implementation partner at this stage in the process. If you were to select another platform, we would not bid on the implementation.
A – Yes. We are seeking a bid from implementation partners.

Q - We understand King's University College has a shared SIS. Is there a desire to have a bi-directional or one-way integration?
A – One-way integration

Q - Is there a preferred "go-live" date?
A – King's next active recruitment cycle begins in September 2024. Recruitment features will need to be ready for use by that date.

Q - What staff and resources does the University have to manage data integration?
A – Technical staff for systems, network, and database. May need further explanation to best answer question.

Q - Is there a preferred method for integration such as API or another approach (e.g. batch file, direct to database)?
A – Data will be staged in a local database; batch or direct to database would make sense for the integration.

Q - In terms of staff users, we understand you are anticipating 24 users in total would have access to the successful system. It is our recommendation that you have administrators and power users with full access to the platform within IT and your Recruitment and Admissions teams. We include below our recommended breakdown of users. As we will submit pricing based on this please let us know if this is agreeable or if you would adjust the numbers.

- Administrators and power users with full access to the platform = 6 (3 x IT, 3 x Recruitment and Admissions)
- Non-admin/power/marketing and application review users to enable access to the platform = 18 (14 x Recruitment and Admissions, 4 x In-Country Recruitment Consultants)

A – This is agreeable to King's, especially if it is based on best-practice.

Q - Has the University secured a budget and if so please can you share with us the details of this?
A – The University operates on a fiscal year that runs from May 1st to April 30th of the subsequent year. This RFP will inform King's budget planning.

Q - Has the University seen demos of any potential CRM solutions or related technologies in the last 12 months? If so, which ones?
A – King's has had demonstrations from SalesForce, Slate, and Ellucian in the past 12 months.

Q - Bullet 2 under Technology states "should work with (not via integration): Constant Contact, Thru Text." Slate is a designed as a CRM which has communication elements inherent at its core. It would serve as a replacement for either of these components. Are you looking to replace these platforms?
A – If the CRM solution includes communication elements, we will replace existing platforms. However, given the scope of Phase # 1 is recruitment, we will continue to use existing platforms for "Applicant" marketing until such a time as admissions moves into the CRM Solution.

Q - Should King's opt to procure Technolutions Slate, the September 2024 timeline to stand up recruitment efforts is possible but tight without knowing additional details on data imports, process needs, experience aspirations, etc. Is the team able to articulate what elements are intended to run in the CRM versus what the team imagines will run out to the "current marketing communication tools?"
A – Given Slate includes "marketing and communication tools", if Slate were selected, we would be seeking to make use of Slate's marketing and communication tools for recruitment in Phase # 1. Implementation timelines can be adjusted if the initial stated goals are too aspirational. If this is the case, please note this in your proposal.

Q - The definition of "recruitment" can really be assessed at any stage of the prospective student/applicant journey. Does the scope of this work include communications and recruitment efforts with current applicants? If so, how will "applicant" information be received in Slate if an application is not to be built until Phase 2: Admissions and Marketing features?
A – King's is seeking a phased implementation of a CRM Solution. In Phase # 2, Admissions would move into Slate and therefore applicants. For Phase # 1, once a "Prospect" becomes an "Applicant" they will be removed from "Prospect" marketing campaigns. However, if this is not best practice, this approach can be altered once "Applicant" data enters the selected CRM Solution.

Q - The "Scope of Services/Specifications" section of the RFP includes Undergraduate Recruitment and Undergraduate Admissions. However, Phase I appears to just be Recruitment. Can you please clarify? If there is a need to implement admissions components (even an import from OUAC) by September 2024, is King's open to a revision of the timeline?
A – It is very difficult to separate Recruitment from Admissions. In Phase # 1, King's is seeking to manage "Prospects" via a CRM solution only. However, once a "Prospect" becomes an "Applicant" we will need to find a way to remove the "Prospect" out of a "Prospect" marketing campaign. When King's moves into Phase # 2, Admissions (OUAC Imports, Admission Decisions, Admission Processing, etc.,) will need to move into the CRM solution which will enable us to market to "Applicants" via the CRM solution. King's is seeking a phased implementation as a means of ensuring a CRM integration at King's is successful while maintaining optimal operating capacity (during a time of change).

Q - As mentioned in question 1, there are a number of questions in this proposal that should be explicitly answered by the responding software provider (not an implementation partner). I am confirming that we do not need to address questions unless related to the implementation process?
A – Correct.

Q - What information can you provide about the data integration and ETL (Extract, Transform, Load) tools currently leveraged within the University.
A – Most ETL tools are developed internally by our dev team. No specific vendors used for this purpose

Q - We are unaware of any Canadian institutions who have implemented a full 360 degree lifecycle CRM. We work with the greatest number of Canadian institutions and our clients have implemented recruitment and admissions components solely. In the US, we have many clients who have implemented Slate for a lifecycle approach, but leverage different databases for this process. Has King's given thought to database structure for the overarching strategy of this implementation? Would it make sense for us to include consultation on the comprehensive lifecycle CRM plan as a foray into this engagement?
A – If you could provide 2 Canadian PSE references and one US reference (for the 360 degree implementation), that would be acceptable. Consultation on database structures to meet the desired goals for a lifecycle CRM would be a welcomed as part of a submission for future phases of implementation.

Q - Is a comprehensive list of detailed and prioritized requirements available?
A – Please prepare your proposal assuming King's will use all of the features that fall into the category of Phase # 1 – Recruitment subject to whichever CRM solution you work with.

Q - It does not appear that a budget has been listed. Are you looking for a budget just for Phase I or for a general idea for a full implementation across all phases?
A – We are looking for a budget/proposal for Phase # 1. Note that the phased approach King's is suggesting is flexible, if some elements of Phase # 2 need to be moved to Phase # 1 to ensure the success of a Phase # 1 implementation. If this is the case, please explain in your proposal.

Q - Based on some of the requirements for recruitment, our implementation recommendation would include custom portals in Slate that incorporate design and front-end development. Is the expectation of King's that the implementation partner include this level of scope in the RFP or would King's utilize internal resources for design elements?
A – Please include in your proposal.

Q - Is King's equipped from a staffing/resource perspective to be able to send data from campus systems/extract current prospective students? We will be responsible for loading data into Slate, but our expectation is that the institution provides any data (in a prescribed format) for upload. If a recommendation for a middleware partner is needed, we are happy to provide that information.
A – For "Recruitment" legacy data will not be moved into the selected CRM Solution. King's will be able to support the import of Phase # 2 and beyond data but will follow the CRM Solution's data structure for "Recruitment". When moving into Phase # 2 and beyond, discussions will need to occur to inform strategy (e.g., the use of a middleware partner). King's has staffing and resources to create the staging database so that data uploads can be done so in the prescribed manner. That being said, recommendations for potential middleware partners are welcome so we can fully assess the opportunities.

Q - When do you expect to begin realizing the benefits from the selected solution?
A – After implementation and full adoption of each phase of the project (noting that King's is taking a phased approach as a means of ensuring success of the CRM implementation).

Q - What is the inventory of your current applications, detailing their functionalities and intended use? Furthermore, could you provide clarity on whether these applications are meant to be kept, replaced, or integrated into the new solution?
A –
PeopleSoft SIS – To be kept (managed by Western University)
Constant Contact – To be replaced (eventually)
ThruText – To be replaced (eventually)

Q - Could you share more on the size and complexity of your existing database for planning data migration and storage solutions?
A – Current database will likely be built out upon selection of the CRM application. At this time we are using 3.5 GB

Q - How does identifying the different user personas and their specific needs ensure that the proposed solution aligns with the diverse requirements of your organization?
A – For Phase # 1 - Recruitment, permissions will be determined by best-practice in the industry.

Q – Can you provide insights into how you envision the project being phased, driven by the priority of requirements, to help in creating a realistic project timeline?
A – Phase # 1 - Recruitment would see the implementation of all recruitment (prospect management features) by September 2024. King's recruitment team begins its active recruitment cycle in September so implementation of recruitment features by September 2024 is essential.

Q - What does the organizational structure look like internally? This will aid in tailoring the solution to fit seamlessly into your existing workflows and communication channels.
A – We have a hierarchical organization structure with the President at the top, followed by Directors for the various areas (eg. Finance, Enrolment, etc), then Managers and all other employees.

Q - Can you help us understand your current governance structures? This will assist in proposing a solution that aligns with your organization's decision-making processes.
A – The Selection Committee has authority to choose the successful bidder to this RFP. Authority to sign a contract will be based on the final amount and the terms of our Purchasing Policy.

Q - What insights can you provide into the strategic drivers behind the transition to a new solution?
A – The key strategic driver behind the transition to a CRM solution is to support King's strategic enrollment management plan of ensuring student enrolment at King's is sustainable. This is especially the goal of Phase # 1 – Recruitment. Subsequent phases are intended to support King's with student retention, student engagement, alumni engagement, marketing, etc.

Q - Do you have specific goals or key performance indicators (KPIs) associated with the project?

A – Increased # of applications, increased # of prospects, improved prospect engagement rates, better insights into prospect interest as a result of interactions with King's.

Q - Can you provide details on your current Salesforce usage, including the modules and features currently in use?
A – King's does not use SalesForce.

Q - Are you open to suggestions for integration toolsets, or do you have specific preferences or requirements?
A – Open to suggestions

Q - Can you provide an estimate of the number of systems that will need to be integrated with the new solution, including any third-party applications, databases, or other software that should seamlessly work together with Salesforce?
A – Ideally federated authentication (Azure), existing and newly created SQL/Mongo DBs, and digital document storage solution (Laserfiche)

Q - If possible, can you share any current state system architecture diagrams?
A – not applicable – architecture will largely be built out upon selection of CRM solution

Q - Could you please provide details on your organization's change management capabilities?
A – The introduction of a CRM Solution at King's has been identified as a strategic priority. Given this, there is a strong driver for change as it relates to ensuring the successful implementation of a CRM solution.

Q - Can you provide information on the size of your current support team? How does this impact the level of support required during and after the implementation phase?
A – ITS: Internal application development (2 FTEs) and Infrastructure team (2 FTEs) will be made available as required. Total ITS FTEs would be .25-.5 during implementation process.

Q - For the purposes of this RFI, at what point will the new system stop and existing systems begin? The intention is to develop a Recruiting and Admissions system, but we can define admissions as concluding at the point of offer, for example, or at the point of matriculation. Please indicate the expected end of capabilities for the phase 1 solution.
A – For Phase # 1, at the point of application, the "Prospect" becomes an "Applicant." A methodology will have to be considered to move a "Prospect" to "Applicant" status given Phase # 1 does not move admissions into the CRM Solution. Note King's proposed phased implementation is intended to ensure project success while maintaining operational capacity.

Q - Is there a current system in place to manage duplicates throughout your digital environment?
A – No.
Q - Please describe how OUAC applications are currently processed at King's, and how you envision them being processed in the future. Are you currently bringing applications directly

from OUAC to PeopleSoft, and if so, do you intend to retain that system or move the application flow to go directly from OUAC to Salesforce? How often is OUAC interfacing with your current systems?
A – OUAC Applications are imported to PeopleSoft, then imported to King's in-house built Microsoft SQL Database for processing. Ideally, under the new CRM System, the OUAC applications will be imported into PeopleSoft and move into the CRM System for assessment/decision. Offers will be distributed via the CRM and will be manually coded into PeopleSoft (no pull of decisions from CRM to PeopleSoft).

Q - Where and how is adjudication currently occurring? Is the intention to keep it in the current system and move application review and decisions to Salesforce, or move adjudication to Salesforce?
A – In Phase # 2, application adjudication will occur via the CRM Solution (e.g., to drive an applicant portal with offers displayed in the portal). However, decisions will still be manually coded into PeopleSoft (Western University's and by extension King's SIS).

Q - Do you have a use case for applications outside of OUAC? For example, non-Canadian residents who intend to apply ONLY to King's and do not wish to apply to any other school in Ontario (105 applicants). Do you, or will you, accept applications from any other portal outside of OUAC? Please indicate the paths (i.e. custom portal, Common Application).
A – King's accepts internal applications, usually non-Canadian residents who only intend to study at King's. There is a use case for this. King's also has a Professional Bachelor of Social Work Program that would benefit from its own application via the CRM (in Phase # 2 and beyond). There are other programs that would benefit from its own applications via the CRM too.

Q - How are decisions shared with OUAC and applicant activities within the OUAC portal related to these decisions shared back to the University? Do you share admissions decisions with applicants in any other portal outside of OUAC?
A – King's admission decisions for OUAC Applications are conveyed via the OUAC Portal. Offers are also mailed and emailed for those residing in Canada. For international students, the offers are emailed. King's does not have an applicant portal at this time nor do we convey decisions via other portals. We do verify offers of admission with the IRCC though.

Q - If the end of admissions is defined as the point of matriculation, then we must consider the period between offer and day 1 as "onboarding." This period may consist of milestones such as: waitlist management, conditional admissions management, applicant decision, deferrals, withdrawals, decision reversals with cause, residency selection, financial aid management and/or integration, deposits and bursar activity, and many more. If this solution is to cover the period between offer and day one, please list the capabilities expected to be performed by the solution and the potential integrations the university would like to initiate.
A – The above relates to Phase # 2.

Q - How are the attendee lists from Ontario University Fairs currently managed? How does the business envision improving this process with a new CRM and marketing tool?

A – OUF attendee lists are transmitted to King's via Western University (the constituent university). Western receives lists from StriveScan. These lists include demographic details as well as contact information – they are currently transmitted as excel files that imported into our Microsoft SQL Database. King's is hoping to better engage/cultivate prospects with a view to scoring prospect interest as a means of informing conversion efforts.

Q - Does King's University have a culture of collecting and marketing to Leads (or suspects), people who have not explicitly expressed an interest in the university but who may be considered potential applicants with an enhanced relationship? Please describe the details of how the lists are procured and how the Lead process is currently handled. For example, how are leads assigned? How large are Lead lists? What engagement is automated and what is manual? When are Leads purged, if ever? What is the intention for Lead Management in the future?
A – King's has a Microsoft SQL Database for managing leads. There are approximately 20, 000 undergraduate prospects per admission cycle. Leads are not purged. King's manually collects leads via LaserFiche forms at fairs, from platforms such as Custom ViewBook and UniBuddy, as well as from other service providers in and outside of Canada. The engagement is largely mass engagement (emails or text campaigns) run via Constant Contact and/or Thru Text. The goal is to better engage (and understand) prospect profiles in King's database with a view to targeting efforts toward the conversion of "high priority" leads.

Q – Does King's work with International Recruiting Agents and Agencies who are NOT employees of the University? Please explain the capabilities you expect to see for Agents and Agencies in the first release. Please describe how you intend to use information related to Agents and Agencies in your business processes.
A – King's is seeking to grant in-country recruitment consultants [~4](those who work directly for King's) access to the CRM system as a means of supporting their region-specific recruitment activities. Note that the in-country recruiters would need limited access rights. Traditional recruitment agents (independent contractors) would not need access; however, agent attribution would need to be trackable.

Q - Please describe your current document management practices and how you envision Salesforce playing a role. In particular, please tell us more about your policies and practices for documents submitted as part of the application.
A – King's University College uses LaserFiche as its document management system. The selected CRM Solution, if it issues an offer letter, scholarship letter, etc., (as examples), would be expected to be able to file to the student's LaserFiche file. Ideally the selected CRM will also be able to display documents in the system (e.g., display an offer letter in a student portal).

Q - How does the University currently identify and engage with the potential prospects?
A- King's maintains a database of prospects that have either interacted with the institution and/or had their information transmitted to us via a third party service provider. King's engages prospects in the database via email campaigns.

Q - How are application requirements determined and communicated to applicants? If this is a partnership with OUAC, please describe how and when requirements are updated.
A – The following webpage explains how application requirements are conveyed to potential applicants: https://www.kings.uwo.ca/future-students/admissions/ Note: For Canadian Citizens, OUAC largely standardizes the process. However, King's does have some specialized programs that require supplementary submissions outside of OUAC (e.g., Catholic Studies for Teachers, requires an application with references) .

Q - Is there a use case for transfer credits? Please explain.
A – King's uses a Transfer Credit Management System – at this stage, we are not looking to introduce another system for this purpose as the Transfer Credit Management System is managed by Western University (the Constituent University).

Q - Can the Implementation and Application Maintenance Service (AMS) to be carried out remotely offshore or onsite or nearshore? The reason we ask is - There will be PHI/ PII and Federal Tax Information related sensitive data. We need to understand if it is acceptable to the client to access the data from India.
A – see 5.3 Data Transfer Outside Canada - King's Privacy Framework; A review of data handling will be required for approval of data access outside of Canada

Q - Are there any specific integrations with other systems or tools that need to be considered? There are a number of integrations identified in the RFP document, can you please list the number of interfaces for each system and the type of interface required (E.g. Synchronous or Asynchronous for real time interfaces) or batch interfaces.
A – Batch interfaces for existing systems is anticipated

Q - Is the expectation of interfaces real time or near real time? What is the expected SLA for data transfer? Should it be near real time, or can it be batch? What is the expected data synchronization lag time?
A – Given size of expected data packages batch processing is acceptable. Ideally near real-time but up to 12 hours data synchronization lag time could be managed.

Q - Who will be responsible to change or build new interfaces on existing systems? Are these source or target interfaces?
A – Internal ITS will update existing systems as necessary.

Q - What level of documentation is currently available on the existing applications and what types of documentation - Functional, Technical, Training, Architecture, Configurations? We will need the information for any integrations required, and to assess the work plan for implementation.
A – Current data will be hosted either in a SQL or Mongo database; database structure not yet determined and will be influenced by selected product.

Q - Will there be any historical student data migrated into CRM? How much of data is expected (e.g. the number of years' worth of data)? What is the source of data that needs to be migrated?
A – For Phase # 1 – Recruitment, historic data will not need to be imported.

Q - What are the key channels and strategy for generating the prospects?
A – In-person recruitment efforts (direct face to face collection of leads in and outside of Canada) and/or via service providers that transmit leads to King's (e.g., Custom Viewbook).

Q - What are the different types of data collected during the inquiry stage and how is it currently managed?
A – Name, email, location, and who the person interacted with on King's team and/or the venue where King's received the lead from.

Q - What are preferred communication preferences for handling inquiries?
A – In-person, phone, email, live chat, chatbot, as well as other modes of communication presented by a CRM solution.

Q - Can you please provide the business workflow for the five stages of the admission funnel.

1. Prospect
2. Enquiries
3. Applicants
4. Accepts
5. Enrolled

A – The intention is to use the selected CRM solution to develop more optimal workflows based on industry best practices and recommendations from the selected bidder. King's is not seeking to move existing workflows (designed outside of the selected CRM solution into the CRM solution). King's will be taking an opportunity to re-assess and re-design its processes as part of this multi-phase modernization project.

Q - How does the University handle and communicate acceptance decisions to applicants?
A – Via the OUAC portal (as applicable), the university's SIS (PeopleSoft via Western University), and by email. King's does not have an applicant portal at this time.

Q - What is the onboarding process for the accepted students?
A – King's runs in-person and virtual Summer Academic Orientation sessions starting each June.

Q - Are there specific language requirements for the system?
A – King's University College is an English language institution. However, some recruitment communications from King's are transmitted in regional languages (e.g., Hindi, Mandarin, Vietnamese). Note: Once a student registers at King's, all communication are in English from thereon.

Q - What are the different steps involved in the enrollment process?
A –

1. Student accepts.
2. Books Summer Academic Orientation
3. Pays deposit as applicable (e.g. residence).
4. Attends SAO
5. Enrols in Courses via the SIS.
6. Starts Classes.
7. Pays fees by the tuition deadline.

Q - Is there any specific academic support or personalized services for the enrolled students?
A – King's has academic advising, student support services (accessibility services, personal counselling, career counselling, learning support,), student financial counselling, etc.

Q - What level of training or support is expected during the transition or post implementation of this project. E.g: Business training or end user training and/or IT operations training?
A – Full documentation related to any relevant APIs/upload formatting. End user training for use of product would be expected.

Q - Are there any data cleansing activities expected as part of this data migration to the CRM platform? Is Data Migration applicable?
A – Data cleansing will be handled by internal ITS processes

Q - How is data consistency or accuracy maintained across different systems, if any, and what is the process to determine the synchronization required between systems?
A – No specific process exists for this project at this time.

Q - Are there any specific security or compliance requirements that need to be considered in the CRM implementation?
A – Attachment – King's Privacy Framework

Q - Is there any plan to rollout the same CRM features in any other countries?
A – No. However, in-country recruiters (as described above) should have controlled access to certain elements of the CRM (as applicable to their role). For example, they should be able to access the leads that they collected for King's.

Q - Please provide details of what is required in regard to security access permissions / roles for sensitive data access?
A – See attachment – King's Privacy Framework

Q - Regarding existing communication channels / tools, are there any plans to explore additional channels in addition to the existing ones (WhatsApp, phone, Chat, Gmail)?
A – Yes. King's is seeking to introduce a CRM solution as a means of better engaging our prospects (in Phase # 1). Please propose the full suite of tools available.

Q – What is the role of the guidance counsellor and global partners in the recruitment process?
A – Only in-country recruiters would have access to the CRM (~4). Agents (independent contractors) and guidance counsellors would not have access. King's does leverage guidance counsellor, institutional partner, and agent networks to support enrolment though.

Q - What are the Non-Functional requirements in terms of performance, browser compatibility, supporting devices, vulnerability scans, future upgrade to maintain CRM, and currency? Please provide details.
A – Access to the CRM outside of a Remote Desktop Environment (e.g., recruiters often operate from cell phones or iPads on a wireless network and/or WIFI network).