JAMES MADISON UNIVERSITY

November 2, 2021

ADDENDUM NO.: One

TO ALL OFFERORS:

REFERENCE:	Request for Proposal No:	**RFP# CMJ-1118**
	Dated:	October 1, 2021
	Commodity:	Customer Relationship Management System
	RFP Closing On:	November 16, 2021 at 2:00pm Est.

Please note the clarifications and/or changes made on this proposal program:

1) **Question: Why aren't you using Anthology for this? They already have a good CRM product for Higher Ed, just what you are looking for. Why put this out for an RFP?**
Answer: Contract via competitive procurement methodology is required of agencies of the Commonwealth of Virginia to the fullest extent possible.

2) **Question Service Group 1: General, Enterprise-wide CRM Functionality is listed as a section that "all offerors must complete" in the RFP. Can JMU confirm that, although Service Group 1 is required, it is acceptable for offerors to answer "Not Available" for some sections within this Service Group? Put another way, will an offerors proposal still be considered if some sections within Service Group 1 are "Not Available," as long as Service Group 1 is completed in full?**
Answer: Yes. JMU does seek an Enterprise CRM platform to be utilized across the university, however, we recognize that not every function/capability will be available within a CRM.

3) **Question: Has JMU identified a budget for this initiative, and if so, is it possible to share? Is there a price above which proposals would not be accepted?**
Answer: Budget information is not available to offerors. Proposals will not be considered nonresponsive based on cost, but per Section VI *Evaluation and Award Criteria* cost is weighted in scoring.

4) **Question: Can JMU please provide the decision timeline for this RFP?**
Answer: The process is ongoing and there is no set date for award of contract.

5) **Question: Is there an incumbent providing similar services to your institution? If yes, then please name the incumbent. If yes, then can you describe why you are proceeding with an RFP to procure services? Are there different / new services you'd like a new vendor to provide?**
Answer: See answer to question #1 above. See Section II *Background* for current CRM providers. This RFP seeks an Enterprise CRM provider as stated.

6) **Question: Did JMU evaluate solutions that could meet its requirements through vendor presentations leading up to the RFP release? If so, what types and names of solutions and vendors were evaluated.**
Answer: The committee did not evaluate any formal offers prior to the RFP release. Top ranked offerors will be asked to present solutions to the stakeholders.

7) **Question: Can JMU share who will be on the evaluation committee for this RFP? Who has the authority to sign the proposal and how do they make decisions?**
Answer: As an active open solicitation, this is not available for public disclosure. We have an internal committee.

MSC 5720
752 Ott Street, Room 1042
Wine Price Building
Harrisonburg, VA 22807
Office of PROCUREMENT SERVICES
540.568.3145 Phone
540.568.7935 Fax

All communication will be through the Procurement Services Buyer, Colleen Johnson.

8) **Question: As a private company, EAB requires an NDA before we can provide a copy of our SOC 2 report. Is JMU willing to sign an NDA prior to the RFP submission deadline so that we may provide our audited financial statements in a protected manner?**
Answer: In the event an Offeror requires an NDA to provide the security information requested with the proposal, JMU asks the Offer to indicate this in the response. Offeror should include the NDA language as an appendix to their proposal for review. The NDA, if utilized, will be specific to the security documents in question, not the entire proposal nor potential business relationship.

9) **Question: Due to COVID-19 and local mandates, our firm has continued to limit access to our local office (where printing and shipping typically occurs) and employees responsible for this RFP response work remotely for the time being. Additionally, employees have been instructed not to enter printing/delivery service buildings if at all possible. With this in mind:**
    a. **Are you willing to accept an electronic signature in lieu of a wet ink signature on all forms?**
    b. **Are you willing to accept an electronic submission in lieu of the hard copies? If not, will JMU accept responses on a USB shipped to your location (no hard copy provided) to reduce the public locations respondents are required to visit in order to submit a response?**

Answer: The university can accept electronic signature on documents. However, the university cannot accept electronic submission of the RFP response. See Section V *Proposal Preparation and Submission* for detailed submission instructions. In the past, Offerors have successfully submitted electronically signed, sealed, copies of proposals to the university through the use of third parties such as Kinkos or Staples which require low/no contact options for their services.

10) **Question: Are there are existing technology investments in student intervention? If yes, how would JMU imagine a new solution to integrate with them?**
Answer: JMU does not currently have a systematic or centralized alerts and intervention system and process.

11) **Question: What other technologies does JMU use to manage the advising process and interact with students?**
Answer: See Section IV.C. Service Group 2: Academic Advising, Student Success, and Early Alerts, current operations overview is provided with technologies used.

12) **Question: What is the level of support – in implementation, launch, and ongoing support – do you require and want out of a partner vendor?**
Answer: Offers should provide any options for levels of support including cost in response.

13) **Question: Does JMU have an implementation team or group in mind that will support from JMU. If so, what roles are included in that group?**
Answer: JMU does not have an external implementation team contracted at this time. JMU will form internal implementation project teams once the CRM platform is selected and the project scope of initial phases are determined. These teams will be cross functional and represent IT and the specific business offices involved.

14) **Question: What strategic challenges is JMU looking to address through this RFP? Are there specific goals JMU is looking to achieve? And in what time period?**
Answer: JMU seeks an Enterprise CRM approach as opposed to individual silos in various areas. This includes seeking a single platform and single data model. Expected outcomes include increased engagement, targeted automated communications, increased retention with early alerts, and a cohesive, 360-degree view of each constituent. There is no set timeline for award of this RFP or go-live of any selected system(s).

15) **Question: What are some challenges unique to JMU that you think proposing vendors should be aware of as they compose their responses?**
Answer: See Section II *Background* and Section IV *Statement of Needs* for narratives on JMU use case and goals.

16) **Question: Does JMU have a preferred "go live" date? When would JMU expect to begin realizing the benefits from the selected solution?**
Answer: There is no set timeline for award of this RFP or go-live of any selected system(s). From an implementation sequence standpoint, the focus will be on Advancement and Advising first with Admissions coming afterwards. JMU is open to recommendations on phasing within these two initial areas from offerors.

17) **Question: What is the total enrollment of students anticipated to be using the solution?**
Answer: See Section II *Background* for enrollments.

18) **Question: Describe how JMU measures success. What metrics is JMU looking to impact with this partnership?**
Answer: As noted in #14, expected outcomes include increased engagement, targeted automated communications, increased retention with early alerts, and a cohesive, 360-degree view of each constituent.

19) **Question: For the goals for participation by certified MBE and WBE firms, can JMU please share if this is graded on a participation scale? Meaning if vendors show effort towards the participation goals, will they be provided a full score for this category in the evaluation criteria?**
Answer: Scoring Participation of Small, Women-owned, and Minority (SWaM) Businesses is based on Offeror or Subcontractor enrollment with the Virginia Department of Small Business Supplier Diversity at proposal receipt, per Section VIII *Special Terms and Conditions* item J. *Small Business Subcontracting and Evidence of Compliance.*

20) **Question: For the "Potential Integration Systems of Interest" on page 16 – how does JMU use some of these tools currently? For example, how is JMU using Customer Satisfaction tools like Happy Signals?**
Answer: Each of the systems listed serve the specific needs of the areas and groups that use them. The provided descriptors for each system provide a general indication of the purpose and how they are being used. In the case of Happy Signals, JMU seeks to understand how the CRM platform can integrate with common customer satisfaction tools to bring a rich and varied view of performance of service-based teams into a CRM (Happy Signals is one example).

21) **Question: Regarding Questions 183 and 184 – Could JMU please explain the difference between the two questions?**
Answer: Question #183 is regarding whether mobile support is included for application users and for what devices and browsers. It asks for any functionality that is not available via mobile relative to a desktop or laptop to be outlined. Question #184 is regarding the offeror's mobile development strategy. For example, whether an app or responsive web design are utilized; how the application is distributed; available development toolsets and security of the application itself.

22) **Question: Regarding Question 175.d – Could JMU please provide an example of a "knowledge article" and who the intended audience is?**
Answer: The audience would be JMU constituents where JMU employees have created knowledge articles/content. Examples of knowledge articles may include information for applicants regarding the schedule for admissions decisions or for a student to find how and where to request tutoring services.

23) **Question: Could JMU please confirm that it uses the PeopleSoft degree audit as well as SIS?**
Answer: Yes.

24) **Question: Could JMU provide examples of the information shared with students by Academic Advising and Student Success via PeopleSoft Campus Solutions?**
Answer: Students can view items such as their transcript, academic requirements, majors/minor, and grades via self-service in PeopleSoft (branded as MyMadison at JMU).

25) **Question: At what point does JMU provide an SIS ID for students? For instance, at the point of enrollment or as prospective students?**
Answer: A prospective student is created in JMU's SIS when they apply to the university at the latest. In many cases, a prospective student is created in the SIS before they apply depending on how they have engaged with JMU.

An electronic ID (eID), along with setting up a password, is created for a prospective student when they apply to JMU. This is used to access JMU applications.

26) **Question: Regarding Question 228.k – Could JMU please provide an example of ticket/case initiation?**
Answer: An example of question #228.k. is if a student has a question about their transcript and would like to submit a ticket or case via a self-service mechanism to have their question answered by the appropriate JMU employee.

27) **Question: Regarding Question 234 – Could JMU please explain what the intended use of a Knowledge Base/FAQ functionality?**
Answer: Use of Knowledge Base/FAQ functionality would allow students to "self-serve" regarding frequent Advising/Student Success questions.

28) **Question: Regarding Question 239.d – Could JMU please explain what the eID/password login described provides access to?**
Answer: The eID acronym is short for electronic ID and represents a JMU constituent's unique username for accessing various systems. In question #239.d, the early alert is to identify students that are not logging into any JMU applications/systems in a specified timeframe.

29) **Question: Would JMU be willing to sign an NDA with the Offeror? This is required for the offeror to share the SOC 2 Type 2 and VPAT documents.**
Answer: See question #8 above.

30) **Question: Have you evaluated any product(s) for the CRM implementation? Is JMU expecting the SI to do a product evaluation?**
Answer: JMU will evaluate products for the CRM platform implementation as part of this RFP. JMU's goal is to procure the base platform as well as solutions for each of the three remaining service groups (Advancement, Admissions and Advising, Student Success and Early Alerts). The solution(s) for the three service groups must reside on a single platform. See Section IV *Statement of Needs* for additional information.

31) **Question: Is a detailed As-is process documentation available with JMU?**
Answer: JMU is currently working within a distributed and siloed environment where each of the main service areas (Advancement, Admissions and Advising, Student Success and Early Alerts) is managed via separate platform(s). As-is documentation is available for some of these areas but there is not a single as-is documentation for a CRM platform as this will be a net new product/set of services.

32) **Question: Could you please provide the user count, location details for Enterprise CRM, Admissions?**
Answer: See response to question #101 below.

33) **Question: Once you've made the vendor selections, what are the next steps in the procurement process? What is the timeline for completion and contract signature?**
Answer: See answer to #16 above. Top offerors will be contacted for clarifications and negotiations.

34) **Question: Has a budget been identified or approved for each Service Group or the entire project? If so, what is/are the budgeted amount(s)?**
Answer: See response to question #3 above.

35) **Question: Due to the current Covid pandemic, our company is taking safety incredibly seriously. We are still working remotely and not sending employees to the post office or other public spaces - would JMU make an exception and allow bid submission via email, through a portal or other mode of electronic transmission, instead of mailing bound original and hard copies with a CD or flash drive?**
Answer: See answer to question #9 above.

36) **Question: If you cannot make an exception and still require mailing hard copies,**
    a. **Can you extend the deadline to account for the possibility of mail delays or delivery issues?**
    b. **In section 3. E., you indicate that each copy needs to be bound - is there any specific type of binding that is required?**

    Answer: At this time the university does not intend to extend the deadline of the RFP. No specific binding type is required.

37) **Question: What date do you:**
    a. **expect to notify/announce shortlisted vendors?**
    b. **expect to award the winning vendors?**
    c. **want the project start date to be?**

    Answer: See answer to question #16 above.

38) **Question: What are the minimum functions that need to be in place for go-live (e.g., full legacy system replacement, Email System replacement, Events System replacement, etc.)?**
    Answer: See response to question #16. JMU is open to recommendations for sequencing and potential MVP go live proposals.

39) **Question: Do you have engagement goals, fundraising goals, or campaign goals you are trying to meet in the coming fiscal year or over the next several fiscal years?**
    Answer: In Advancement, we will complete our capital campaign June 30, 2022 and have already met our goal of $200M. We hope to implement a new system prior to starting the next campaign. Fundraising for expendable scholarships and a focus on tracking alumni engagement will be priorities in the coming years. See Section IV *Statement of Needs* for expected outcomes across the university a result of implementing an Enterprise wide CRM.

40) **Question: Are you currently in a capital campaign? If so, when does it conclude?**
    Answer: Yes. The current capital campaign ends June 30, 2022. Goal was $200M which we have exceeded already.

41) **Question: Are there any institutional initiatives (e.g., Capital Campaign, Student System Replacement, etc.) that could affect resource availability?**
    Answer: JMU is open to proposals that include multiple options for support/consulting services so that it can appropriately address resource availability for the project while supporting other ongoing institutional initiatives.

42) **Question: When does your fiscal year begin, assuming July 1?**
    Answer: Our fiscal year begins July 1.

43) **Question: Will you be able to award to multiple vendors off this singular RFP (software and services/implementation)?**
    Answer: The university may opt to award to one or more offerors for single or multiple Service Groups outlined in the RFP. Note: negotiations and contract will be with the Prime Contractor that submits the RFP and signs the coversheet, not awarded to Subcontractors. See Section VIII. Special Terms and Conditions #R. *Prime Contractor Responsibilities* and #S. *Subcontracts*.

44) **Question: Do you use MS Outlook, SharePoint, Teams or G Suite and Slack?**
    Answer: JMU utilizes the Office365 suite of products including Outlook, Teams, and SharePoint.

45) **Question: JMU has a broad vision and set of technology needs. What is your appetite for doing a large MVP? Is JMU open to a phased project approach and running concurrent workstreams?**
    Answer: See answer to question #16 above.

46) **Question: If so, do you envision doing the different phases of this project (Advancement, Student Success, Admissions) sequentially or concurrently/in-parallel?**

Answer: See answer to question #16 above.

47) **Question: There are two different ways we could approach your desired project vision: 1) we could build extensive scope and functionality within individual units and sequentially address each unit or 2) we could build a MVP for individual units (e.g., Advancement and Advising) and layer on additional functionality for subsequent phases. Has JMU discussed a preferred project approach? Factors that may influence this include:**
   a. **Desired time to go live**
   b. **Stakeholder availability for detailed requirements gathering and collaboration**
   c. **Stakeholder acclimation to a new technology and stabilization period where we can fine tune requirements for additional phases**

   Answer: JMU has not committed to a specific approach as outlined. We are open to recommendations from offerors on approach. We request that options be outlined from a cost standpoint be included in Section X *Pricing Schedule*. Advancement and Advising will come first from a sequencing standpoint.

48) **Question: Has JMU considered a multi org strategy?**
   Answer: JMU seeks a single platform and single data model that can provide a modern, scalable solution.

49) **Question: Are there plans to merge the SPCE instance of Salesforce with a new org?**
   Answer: See response to question #48 above.

50) **Question:**
   Change and Training:
   a. **What is prompting this implementation for your organization? Are there any critical dates or milestones that are driving this engagement?**
   b. **How much will you be engaging end users in this process? Will your implementation partner have access to end users?**
   c. **Will you be involving external constituents (e.g., donors) within this process?**
   d. **What members of staff and/or departments will be involved in this implementation and how much of their time will be dedicated to this implementation? What is their technical capacity?**
   e. **What resources will support the project post go-live? Are you seeking vendor support?**
   f. **What onboarding needs does JMU have?**
   g. **Has your institution ever undertaken a digital transformation like this before?**

   Answer:
   a. See Sections II (Background) and IV (Statement of Needs) for descriptions of needs and expected outcomes. As stated in the response to question #16, there is no set timeline for award of this RFP or go-live of any selected system(s).
   b. JMU plans to organize cross functional project teams to support the implementation and delivery. Selected power users will represent the needs to their area and be available to the implementation partner.
   c. Project team members will represent the needs of external constituents during this process.
   d. See response to question #13. Some team members will be allocated 100% to the implementation, however many others will not. JMU will assess based on proposals and adjust as needed. IT involvement will ensure a high level of technical capacity for JMU's existing systems and environments. Depending on the platform selected, some technologies may be net new to JMU from a technical perspective.
   e. Unable to provide an answer at this time, the need for post go-live support will be negotiated with top offerors.
   f. JMU is interested in understanding what offerors can provide in support of new user onboarding and what the associated pricing would be. Offerors should provide pricing in Section X, *Pricing Schedule*).
   g. No.

51) **Question Service Group 1: How important is a 360 degree view of constituents across the entire lifecycle, from prospect to alumni?**
Answer: This is a high priority expected outcome for this project. Although JMU will control access to some data associated with a constituent based on need, a primary goal of this project is to create a centralized, non-siloed approach to constituent engagement.

52) **Question Service Group 1: How many constituent records do you have in your current system?**
Answer: JMU does not have a current enterprise wide CRM platform.

53) **Question Service Group 1: General Integration:**
   a. **Understandably JMU has a complex ecosystem. Have you considered which systems you're looking to replace or sunset (e.g., HandsOn Connect, Blackbaud Award Management, iModules, OnBase, Slate, CollegeNET, Aceware, etc.)?**
   b. **Does JMU have existing integration tools that will be used for this project?**
   c. **Do you have internal resources who will be performing integration development on this project or are you looking for the selected vendor to fully complete the integration?**
   d. **Do you have IT support to manage your internal infrastructure?**
   e. **Are you currently targeting an integration solution (i.e. Mulesoft)?**
   f. **We have three integration options that we could suggest. Is one of the options below more appealing from a maintenance standpoint? (Note: There is a path from #1 to #3 in the future as your organization evolves.):**
      i. **We build and operate your integrations for you**
      ii. **We build and operate your integrations, but you own the underlying integration platform**
      iii. **We build and transition your integrations; you own the integration platform and operate the integrations after go live**

Answer:
   a. JMU will evaluate the replacement of existing systems based on available functionality/feature sets, however, as stated in Section IV *Statement of Needs*, JMU is seeking a cloud-based Enterprise CRM Platform, packaged applications that reside in a CRM Platform, and implementation services to support CRM functions across the university including Recruitment and Admissions, Advancement, and Advising/Student Success at this time.
   b. See response to question #54, the offeror should provide information on any systems they are or are not compatible with.
   c. JMU expects offerors to provide multiple options for integration.
   d. Yes.
   e. See response to question #54, the offeror should provide information on any systems they are or are not compatible with.
   f. JMU requests offerors to provide multiple options for integration, offerors must provide a cost breakdown in Section X *Pricing Schedule*.

54) **Question Service Group 1: You mention ISaaS as your method of integration, please can you share what tool you are planning to use?**
Answer: There is an ongoing sealed solicitation in progress at this time, no further information about that procurement will be shared publicly at this time.

55) **Question Service Group 1: What financial system do you have in place? Describe your current integration with Ellucian and your future integration needs?**
Answer: JMU Advancement does not integrate with our Foundation financial system. The Foundation is provided financial reports from Advance daily to enter in their system.

56) **Question Service Group 1: Other than Ellucian Advance, are any other applications of the ones listed under integrations under 57d that you are open to replacing?**
Answer: See response to question #53a.

57) **Question Service Group 1: Is your current Tableau Server hosted on premise or in a JMU-owned cloud deployment?**
Answer: On premise.

58) **Question Service Group 1: What types of operational reports do you run? What types of leadership reports or dashboards do you have?**
Answer: There are no dashboards. JMU has Fundraising Progress, Progress to Goal, Year over Year progress reports as well as campaign and fundraiser KPI reports.

59) **Question Service Group 1: What types of high level leadership reports do you generate and how often? (e.g. Fundraising Progress, Progress to Goal, Year over Year progress).**
Answer: JMU has Fundraising Progress, Progress to Goal, Year over Year progress reports as well as campaign and fundraiser KPI reports. Everything is scheduled for weekly delivery to email on Monday.

60) **Question Service Group 1: We want to find efficiencies where possible and capitalize on good work you've already done. Have you gone through data standardization or data definition exercises? Often this happens with data warehouse and BI initiatives.**
Answer: JMU is actively working on data definitions which will be used for data standardization in the future.

61) **Question Service Group 1: Does JMU have a center of excellence or a data governance committee?**
Answer: JMU has an established data stewardship process and has formed a data governance committee. This committee is actively engaged in data definitions at this time.

62) **Question Service Group 1: Can you tell us more about the call center functionality? Does the call center only support the Office of Advancement?**
Answer: Call center functionality is used by multiple campus areas including Advancement and Admissions.

63) **Question Service Group 1: Referencing requirement 176, what type of content will users see in the one stop shop portal?**
Answer: Sample feature sets/content are listed in the RFP document under Case Management/Ticketing item number #175. For initial implementation the focus will be on content in support of constituent engagement in the areas of Advancement, Admissions and Advising.

64) **Question Service Group 2: For the Service Group 2 requirements: timeline for completion; course co-requisites, prerequisites, and actual available course offerings; graduation requirements – does this data exist in current IT systems? If so, what systems does this data reside in?**
Answer: Yes, within PeopleSoft Campus Solutions. Co-requisite (CR), Pre-requisite (PR), and graduation requirements exist in the current system. However, the sequence of requirements and PRs do not exist. Course offerings only exist for the upcoming semester (not for distant future).

65) **Question Service Group 2: The goal of the following questions is to assess the level of complexity to build an accurate ROM for an advising solution.**
    a. **How many different advising models do you have (e.g., assigned advisors, advising pools, walk-in hours, etc.)**
    b. **How many advising units or departments do you have (e.g., career services, financial aid, etc.)?**
    c. **Are you serving multiple schools? What is the average caseload per academic advisor?**
    d. **How well understood are your advising processes? Have any units gone through a documentation generation phase that would be a starting point when working with an implementation partner? This could include business process and workflow documentation, enterprise system architecture, etc.**
    e. **When you are advising, do you have prescribed activities? Do you have defined student steps? Is it the same list for first generation students for example?**

Answer:
    a. JMU has a Split Shared Model where advising is carried out by faculty in some departments, an advising center in other departments, and an advising hub to support advising throughout campus. Students are assigned advisors which consist of one or more of the following types: First-year, major, honors, pre-

professional programs, pre-professional health (minors), graduate, athletic, minor, and career. Advisors typically offer individual appointments (in-person, phone, virtual), group appointments, and walk-in (in-person, virtual). Some advisors meet with current students, newly admitted, returning students, and alumni [pre-professional health].

b. There are approximately 53 departments (including honors, university advising, pre-professional health advising, advising and success center (COB), university career center, student-athlete services, and financial aid).
c. No, we serve a single campus. Caseloads range from 5-1100, depending on the college, degree program level (UG/GR), and advisor responsibilities.
d. Comprehension of advising processes varies among departments and units. Pre-professional health advising and honors have worked with an implementation partner.
e. Activities vary among departments and units. There is no known list for first-generation students specifically.

66) **Question Service Group 2: We see a lot of traditional SIS capabilities in the requirements, specifically in the Academic Planning and Degree Progress section of the RFP. Can you tell us more about your SIS strategy?**
Answer: JMU is interested in how the Advising solution can integrate existing features/data from the SIS within the Advising solution, providing a one stop shop for students and advisors alike.

67) **Question Service Group 2: Can you provide additional detail about the system of flags and interventions that you are looking to implement? Is this something you do today? Are you looking to build predictive models to predict early intervention?**
Answer: This would be a net new set of functionalities for JMU. See the overview provided in the Early Alerts/Interventions section of the RFP questions #238-240.

68) **Question Service Group 2: For the requirement: forecast and address course demand and number of seats by semester or year. - What data does JMU currently use to forecast course demand?**
Answer: Within the SIS, queries are run on course enrollment/course registration and degree audits (how many students need to complete x requirement) to provide data around course demand.

69) **Question Service Group 2: For: "allow the Advisor to text message a student via the application and the student response goes to the Advisor's email." - Are you asking for a record of the text message response from the student on the student's record for advisors to see? Or, are you asking for a workflow for the text message just to be sent to the advisor's email address?**
Answer: Both.

70) **Question Service Group 2: For: "Reports related to anticipated course demand." - can you describe what metrics you currently use to anticipate course demand? What threshold for course enrollments would JMU use to open a new section of a course?**
Answer: See response to question #68. The current process is manual involving spreadsheets.

71) **Question Service Group 2: What is the number of contacts (students, faculty, etc.) you expect to be in your database annually?**
Answer: JMU's current enrollment is approximately 22,000 full and part-time students. The university employs approximately 4,000 faculty and staff. Beyond Advising, constituents for which we may have contacts for in an Enterprise CRM may include almuni, parents, friends, and external organizations/partners. From an Advancement standpoint, we have a total of 148,689 alumni and 16,605 donors in FY21 with over 425,000 total contacts in our current system.

72) **Question Service Group 2: What is the number of annual email messages sent annually to contacts in your constituents?**
Answer: From Anthology (iModules), over the last year, close to 2,000 individual emails to multiple groups. Student affairs uses Anthology (iModules) to send weekly updates to students.

73) **Question Service Group 2: Do the 40 full-time Advisors operate within a single department or multiple departments? If multiple departments, how many different departments will the solution support?**
Answer: Multiple departments. The intent is that the Advising solution in the Enterprise CRM platform will be utilized by all advisors; including, but not limited to, full time advisors, faculty advisors, athletics advisors, and tutoring. As many as 53 departments would be served by the solution. JMU is open to recommendations on phasing.

74) **Question Service Group 2: Academic Advising Marketing:**
   a. **We see that one of your requirements for communication is to "allow the application to send scheduled meeting reminders via text messaging or email to students asking them to 'confirm' their appointment" - do you anticipate the need for a separate Marketing build for this unit or will you partition the Marketing build from Service Group 1: General Enterprise-wide CRM Functionality**

Answer: JMU expects the offeror to provide available options (separate marketing build vs partition) and provide a price breakdown in Section X *Pricing Schedule*.

75) **Question Service Group 3: Has an overall timeline been established for the desired go-live of the new Comprehensive Advancement Software Solution? Is there an event (e.g., current system expiration date, campaign readiness, etc.) that is influencing the timeline?**
Answer: See response to question #16 above.

76) **Question Service Group 3: Can you please provide a high-level overview of your Advancement Office structure and how Central IT and Advancement work together?**
Answer: See JMU Advancement Current Operations Overview provided in Service Group 3. Organization chart is available here: https://www.jmu.edu/advancement/organization/index.shtml.

77) **Question Service Group 3: Will this project be led by Advancement, Central IT, both, other? If multiple, which office will be responsible for what role?**
Answer: Both, Advancement project representatives will serve as subject matter experts as well as preparing and identifying data for migration. Central IT will provide project and technical implementation support.

78) **Question Service Group 3: How many users will be using it? *(70 FTE noted in RFP for Advancement)***
   a. **Is it possible to provide a breakdown of user counts by role (e.g., Advancement Services/Operations, Gift Officers, etc.)?**
   b. **Are the 70 users in Advancement in a single, centralized department? If not, how many different departments will the solution support?**
   c. **If you have an organization chart that shows the staff/roles that would be great to have.**

Answer: Expect that all individuals in Advancement as well as key resources in other departments would use the system. Advancement is centralized. An organization chart and department information is available here: https://www.jmu.edu/advancement/organization/index.shtml.

79) **Question Service Group 3: For data to convert from a legacy advancement system?**
   a. **Are there any additional shadow databases that need to be migrated?**
   b. **How many total New Constituent records will need to be migrated?**
   c. **How many total Income/Gift records will need to be migrated?**
   d. **How many new Constituent (Entity) and Gift records are estimated to be added on a yearly basis?**
   e. **Are you aware of any data issues in your current legacy system (e.g., historical data issues from a prior conversion that were never cleaned up, etc.)?**

Answer:
   a. No shadow databases.
   b. 425,000 constituent records.
   c. 1.5M gifts/pledges/matching gifts.
   d. Yearly addition of 10,000 (mostly students and their parents).
   e. Not aware of significant data issues.

80) **Question Service Group 3: Do you currently have a data warehouse either specifically for Advancement or at the enterprise/university level?**
Answer: Yes, specifically for Advancement. We do not have an enterprise/university level data warehouse.

81) **Question Service Group 3: Does Advancement have access to data across campus or build programs with certain departments like athletics, as an example?**
Answer: Advancement has access to some data from across campus and the intent is to expand this over time within the Enterprise CRM.

82) **Question Service Group 3: Do you currently have a grateful patient program?**
Answer: No. There's no hospital/medical center affiliated with JMU.

83) **Question Service Group 3: Do you have examples of any other type of analytical reports the Advancement team uses? (e.g Financial forecasts, Prospect Pool Potential, Likelihood to Give)**
Answer: Pipeline reports are utilized. Examples will be provided to the awarded contractor at the outset of implementation.

84) **Question Service Group 3: Which groups do you share your reports with, both inside and outside the Advancement team?**
Answer: Stewardship reporting is provided to all areas of the University.

85) **Question Service Group 3: Referencing requirements 264-277, can you tell us more about what you are looking to do in the alumni online community? Do you want to support gift giving as well as traditional alumni relations features like class notes all in one place?**
Answer: JMU expects offerors to provide an overview of available alumni community features. Core features JMU is interested in are outlined in RFP CMJ-1118 items #264-277, including alumni relations features.

86) **Question Service Group 3: Please confirm that you are using Anthology (iModules) for your alumni website and/or donor portal. What is included in the website/platform? Directory? Clubs and groups? Jobs Board? Giving history?**
Answer: Yes, we are using Anthology (iModules) for Online Giving, Event Registration and Email Marketing. There are 142 landing pages for either fundraising, events or information.

87) **Question Service Group 3: How many staff currently have access to Anthology (iModules)?**
Answer: There are 173 Anthology (iModules) accounts in use across campus.

88) **Question Service Group 3: Please confirm that you use Anthology (iModules) for your events platform for alumni and constituents. Are there other Events platforms in use by alumni? Are there other event platforms in use for students? Are your events paid? Free?**
Answer: Yes, we are using Anthology for Online Giving, Event Registration, and Email Marketing in Advancement. Some Advancement events are free, many are paid. Other events products are in use in areas outside of Advancement. Additionally, other systems are involved including an Event Management System related to physical space.

89) **Question Service Group 3: Are volunteers primarily supporting the Office of Advancement? Can you tell us more about who your volunteers are (e.g., alumni, students, etc.) and what they should be able to see or do in a portal?**
Answer: Currently the portal primarily supports volunteers for Advancement-related events and opportunities, but could be used for much more with wider adoption. Our target for volunteers is alumni but would love to expand to students.

90) **Question Service Group 3: For the External Constituent Portal, please indicate which of the following features are of interest: Events, Volunteer Management, Chapters/Clubs, Mentoring, News, Directory, Online Giving, Profile Updating/Viewing, Giving History Portal, Job postings and referrals.**
Answer: All of the above.

91) **Question Service Group 3: How many total Alumni records will need to be migrated to the new solution?**
Answer: More than 150,000 alumni.

92) **Question Service Group 3: How many Alumni could make use of a new, richer Alumni Community (portal)?**
Answer: Unknown at this time.

93) **Question Service Group 3: How many alumni visit or login to your existing website/donor portal on average in a month or a year?**
Answer: JMU received 16,000 online gifts during the FY21.

94) **Question Service Group 3: How many gift officers are on staff? How many in advancement services?**
Answer: 20 Gift Officers; 12 in Advancement Services.

95) **Question Service Group 3:**
Advancement Integration:
   a. **For systems to integrate with this new solution?**
      i. **If possible, please describe the method of integration (e.g. flat file, API, etc.) and frequency (Nightly, Monthly, on-demand, etc.) preferred for the different system integrations.**
      ii. **If you have a diagram that shows your current integrations and their flow/relationship to your current advancement system that would be helpful.**
   b. **For the Integration/Middleware solution, is JMU open to alternative solutions?**
   c. **Are you using payment processors today for financial transactions? If yes, which products and for what type of information?**

Answer:
   a. JMU anticipates both real time/near real time and batch type integrations to be a part of the solution.
   b. JMU anticipates using an iPaaS (integration platform as a service) product as an option for integrations with the Enterprise CRM; Pre-built connectors/integrations are also an option.
   c. Cybersource and Bluefin are used currently.

96) **Question Service Group 4: Is Recruitment and Admissions a single department, or are there multiple independent departments? If there are multiple departments, how many separate admissions departments will require support? (Please consider undergraduate and graduate programs.)**
Answer: There are three admitting offices at JMU, Undergraduate, Graduate, and Professional & Continuing Education. The intention is for all three to move into an Enterprise CRM.

97) **Question Service Group 4: Out of your existing tech stack detailed across R&A use cases, can you identify which systems you intend to keep vs. which ones you're open to replacing? (i.e. Slate, EvolutionLabs360, etc.)**
Answer: The intention is to utilize the Enterprise CRM for CRM functions across the university including in all three admitting areas. Additional peripheral or third-party integrations will be utilized where necessary.

98) **Question Service Group 4: Can you please share your institution's data retention policy regarding applications for both enrolled and unenrolled applicants?**
Answer: Not available at this time.

99) **Question Service Group 4:**
Recruitment and Admissions:
   a. **Where are applications coming from (e.g., Common App)?**
   b. **Do you currently have a webform tool? If so, which one?**

c. **Can you walk us through a typical day in the life of someone on the Recruitment and Admissions team for Undergraduate and Graduate Admissions? Are there any edge cases/processes we should be aware of?**
d. **Do all of your programs follow a single academic calendar? If not, how many academic calendars do you have?**
e. **Do you ever enter leads into your database that may not have explicitly requested information about your school or its programs (i.e., list purchases, names from test sites, etc.)? If yes, what does that volume look like (i.e., hundreds of names or thousands)?**
f. **What is the volume of applications and applicants per year?**
g. **How do you communicate application status to an applicant? For this purpose, do you send emails manually or are they automated? What details about the individual's application do you include in the body of this email? How does this vary based on application source?**
h. **How does an applicant accept or decline admission? Is there a formal process and financial deposit?**
i. **When do you release admissions decisions (e.g., by semester, rolling basis)? Do you send paper or electronic decision letters?**

Answer:

a. The Graduate School: CollegeNet
Undergraduate Admissions: CollegeNET, Coalition and the Common App.
School of Professional & Continuing Education (SPCE): CollegeNet for credit courses, non-credit programs are just enrollments.
b. The Graduate School: CollegeNet
Undergraduate Admissions: Admissions uses Qualtrics or Question Pro. Our current CRM, Slate, also has a form tool that we use.
SPCE: Currently use Wufoo form builder, would prefer to something more robust.
c. Not available. Information may be made available to top offerors in negotiations.
d. Undergraduate Admissions: Three, Spring, Summer, and Fall.
The Graduate School: Three, Spring, Summer, and Fall.
SPCE: The programs follow the academic year, but have various starts to programs for Adult Degree Program and various noncredit programs. Credit programs are on the academic schedule but have cohorts that may or may not start every year.
e. The Graduate School: Yes, thousands.
Undergraduate Admissions: Yes, thousands.
SPCE: Not at this time.
f. The Graduate School: 2,600.
Undergraduate Admissions: Between 24,000 and 27,000 freshman, transfers and international applications.
SPCE: Less than 200 for credit programs. Less than 500 for non-credit programs.
g. The Graduate School: CollegeNET Activity Center, emails are automated.
Undergraduate Admissions: By email, mostly automated, there is no variation by applicant source, there is a variation by applicant type (freshman, transfer, or international).
SPCE: Adult Degree Program through the applicant center; Graduate Students go through CollegeNet, Nondegree seeking are processed all in SPCE by personnel using PeopleSoft. Emails are sent to those students about acceptance and all registration.
h. The Graduate School: Through the CollegeNET Activity Center.
Undergraduate Admissions: UG Admissions has a portal through MyMadison that the applicant uses to accept or decline. There is a formal process and a financial deposit.
SPCE: Various applicants for SPCE programs: nondegree seeking (apply but not really an acceptance process), credit students (manage in partnership with The Graduate School process), Adult Degree program (managed by an outside agency), nondegree seeking students (enroll but not accepted, they enroll), Lifelong Learning Institute (enroll but membership based), Youth Programs (enroll), Economic Development projects (sign up but not accepted or enrolled), and Outreach & Engagement (enroll or register to participate). ADP currently has a deposit required.
i. The Graduate School: Rolling basis, via the Applicant's CN Activity Center page.
Undergraduate Admissions: By semester (term), electronic.

SPCE: Follows university processes and is electronic, on a rolling basis.

100) **Question Service Group 4: What is your current document management solution used to support physical application materials that must be scanned, indexed and mapped to current applicants? (we would love to learn what tool is being used and more about this process)**
Answer: OnBase is the current document management solution at JMU.

101) **Question Service Group 4: What is the total number of individuals that would require access to applications across all use cases?**
Answer:
The Graduate School: 300.
Undergraduate Admissions: Greater than 44.
School of Professional & Continuing Education: 10-15.

102) **Question Service Group 4: What is the volume of applications across all use cases you anticipate annually?**
Answer:
The Graduate School: 2,600.
Undergraduate Admissions: 27,000 to above 30,000z.
School of Professional & Continuing Education: Estimated at 500 or less with the inclusion of all programs.
Applications – Registration – Enrollment depending on the program what term would apply.

103) **Question Service Group 4: What is the total number of individuals who would require create/edit access to application forms?**
Answer:
The Graduate School: 4.
Undergraduate Admissions: 3+.
School of Professional & Continuing Education: 10-15.

104) **Question Service Group 4: What is the total number of individuals who would require create/edit access to events?**
Answer:
The Graduate School: 2.
Undergraduate Admissions: 13.
School of Professional & Continuing Education: 10-15.

105) **Question Service Group 4: Do you have a required/preferred payment gateway?**
Answer: Application fees are processed through the respective systems used in the application process, CollegeNet, Coalition and the Common App. Deposits are processed through the University Business office using CashNet.

106) **Question Service Group 4: What systems does the Graduate Student Financial Aid team currently use that would require integration(s) to support marketing automation?**
Answer: Response unavailable at this time.

107) **Question Service Group 4: Application Review:**
   a. **What's the ideal end state for the review process?**
   b. **Please describe how your prospects and applications are assigned. Do you require territory management? If yes, please describe your territory assignment rules.**
   c. **Out of the total number of individuals who would require access to applications, how many of those individuals are only applicant reviewers (meaning, they review complete applications to make admissions recommendations) only?**
   d. **How many programs do you have?**
   e. **Can you describe how your applications are routed for decisions? Do you use committees, or are decisions made by single individuals?**
   f. **What tasks does an application reviewer complete to make a decision on an application?**

g. **What feedback would an application reviewer be providing internally or externally about the applicant?**

Answer:

a. Offeror should detail available options. JMU response not available at this time, information may be made available to top offerors in negotiations.
b. The Graduate School: By graduate program/grad program director and not by territory
Undergraduate Admissions: UG Admissions uses Regions based on a Zip code tree in our system of record. Our prospects get regions assigned based on the available data.
School of Professional and Continuing Education (SPCE): Our review process is not by location/territory but by program. Education Dynamics handles the process for Adult Degree Program (contract expires 6/2023).
c. The Graduate School: 293.
Undergraduate Admissions: 0.
SPCE: Not part of SPCE processes.
d. The Graduate School: 76.
Undergraduate Admissions: 8 see https://www.jmu.edu/advising/acadreq/degreereq.shtml for additional information.
SPCE: 6 within the school: Economic Development, Outreach & Engagement, Youth Programs, Lifelong Learning Institute, Credit (with The Graduate School), and noncredit (Professional Development).
e. The Graduate School: Varies by program.
Undergraduate Admissions: Applicant decisions are made both by individual recruiters and by committee. There is also a further review process for non-standard applicants.
SPCE: Nondegree seeking students are made by one individual. Other programs either follow the university model or do not require a decision as they register/enroll and proceed.
f. The Graduate School: Varies by program.
g. The Graduate School: Admission recommendation and conditions for admission.

108) **Question Service Group 4: For your continuing education programs, how many students do you serve? Are you looking to expand the JMU SPCE brand?**
Answer: JMU serves about 500 students in various ways because of the programs that we offer. We are always growing and expanding our student base because of the new events/workshops/courses we offer.

109) **Question Service Group 4: What processes are currently in the SPCE instance of Salesforce? Is this just for adult degree programs? Would you be looking to replicate this functionality in a new org?**
Answer: Marketing for various Professional and Continuing Education programs is occurring via Salesforce currently. The intention is to eventually have the current PCE processes in the Enterprise CRM.

110) **Question: What teams/departments is your Marketing Team currently serving?**
Answer: Communications and Marketing serves the entire university. Additional departments have marketing resources that serve both internal and external constituents.

For example, the School of Professional & Continuing Education is served by one person currently. Within the school, there are several programs and partnerships that are supported inclusive of: Professional Development (noncredit and credit with colleges), Economic Development, Outreach & Engagement (Lifelong Learning Institute, Youth Programs, etc.), and Adult Degree Program.

111) **Question: What functionalities would you like to use but aren't today?**
Answer: Examples include visibility into emails that are planned to be sent; essentially an email marketing calendar across areas as well as analytics on emails (click rates, open rates, etc.).

112) **Question: Can you describe a use case for the following requirements listed in the RFP requirements point 65 "display a 360-degree view of a constituent's engagement with JMU including, but not limited to all contact/attempted contact with an entity and related information: phone calls, text messages, emails, chat transcripts, in-person meetings (including location), file attachments, attendance at events (including alumni), gifts to the university, and cases."**

Answer: A user, with appropriate access, can view the emails a prospective student received prior to joining JMU, a file with supplemental information from their application to JMU, a chat transcript from when the student needed advising assistance, a ticket/case logged with a question regarding having their transcript provided to a graduate program, and attendance at a 5 year graduation anniversary event as an alum.

113) **Question: How do you currently capture and track email preferences (eg. opt-in vs. opt-out)?**
Answer: Varies by department and the technology in use.

For example, within the School of Professional & Continuing Education (SPCE), emails are collected via a registration for a course or by asking to be included on a mailing/subscription list. For communications that are sent out using our current tool users have the option on every email to opt-out and select what they are opting out of - a singular message for a specific program or messages from all programs

114) **Question: Who will be the power users of the platform on a day to day basis?**
Answer: Initially, key users in Advancement and Advising will be power users of the Enterprise CRM as these are the first two areas from an implementation sequence standpoint. JMU anticipates this will increase over time.

For the Marketing Specific features, within School of Professional & Continuing Education (SPCE) power users would be the Adult Degree Program and Professional Development (noncredit courses). Both programs actively engage and recruit/sale of the programs to students.

115) **Question: What is the total number of contacts in your marketing database, inclusive of prospects, inquiries, applicants, etc.?**
   a. **What is the number of annual email messages sent annually to contacts in your marketing database?**
   b. **Does JMU manage its own search marketing campaigns for new prospects? If so, what is the volume of prospects purchased each year? If possible please share the typical distribution of Sophomores, Juniors and Seniors.**

Answer: Varies by area. See responses to questions #72 and #79 for Advancement information.

For example, within School of Professional & Continuing Education (SPCE), SPCE does not manage its own digital marketing campaigns, but SPCE does place posts on social media to drive prospects to a website to subscribe, register, etc.

116) **Question Service Groups 3 & 4: How many separate landing pages are used in your marketing campaigns (for Advancement SVC GRP 3 and Admissions SVC GRP 4) to contacts within your marketing database, inclusive of all stages?**
Answer: For Advancement, 142; for The Graduate School Admissions, 100, one landing page per program; School of Professional & Continuing Education (SPCE), about 10 that are managed internally or by Education Dynamics through contract for recruitment purposes.

117) **Question Service Group 4: What number of contacts are your marketing database(s) for Advancement?**
Answer: See response to question #79.

118) **Question: What is the number of annual email messages sent annually to contacts in your marketing database?**
Answer: See response to question #115.

119) **Question: Do you anticipate partitioning the email system into different business units (e.g. different brands or different regions) or will all marketing activity be consolidated into one business unit?**
Answer: Marketing activities will be executed by different JMU business areas for different constituencies.

120) **Question: What is your priority phasing for Communication Channels for the project?**
   a. **Email**
   b. **SMS**

c. **App push messaging**

Answer: JMU is open to recommendations from offerors on phasing. See question #16.

121) **Question: Can you share any current state architecture diagrams of your systems landscape & integrations?**
Answer: Current landscape is described in Section II *Background* and at the beginning of each section of the Section IV *Statement of Needs*. Integrations of interest are listed where applicable.

122) **Question: Are there any automated journeys (drip nurture campaigns) or triggered emails that you currently use today or are looking to implement in this first phase?**
Answer: JMU would eventually like to support drip campaigns. There are none now, Advancement would like to create one as part of the first phase of its implementation. The School of Professional & Continuing Education (SPCE) would prefer at least three during the implementation for their department. The first phases will be focused around Advancement and Advising, with Admissions coming later.

123) **Question Service Group 3: How many emails does the department send to constituents per year?**
Answer: See response for questions #72.

124) **Question Service Group 3: How many contacts (unique email addresses/handles) are there in your marketing database?**
Answer: See response for question #79.

125) **Question Service Group 3: How many users are there in the current marketing automation system(s)? If applicable, please list an approximate number of users by business unit (i.e. Annual Giving – 3, Alumni Association – 6, Donor Communications – 4, etc.).**
Answer: JMU cannot provide a breakdown but there are 173 total users of Anthology (iModules) across the university.

126) **Question Service Group 3: How many departments will be utilizing the solution?**
Answer: JMU anticipates that the number of departments using the Enterprise CRM will increase over time. We request pricing model/tiers that reflects growth over time in Section X *Pricing Schedule*.

127) **Question Service Group 3: Do your departments require separate data security, content, and reporting? Or can they work in a shared environment?**
Answer: The intention is to utilize a single shared environment with a single data model, however, data security will need to be in place. For example, an academic advisor should not be able to access wealth screening information for an advancement prospect. For the three Admissions offices, there are certainly unique business processes and data for each area, however, there is overlap as well.

128) **Question Service Group 3: What reporting do you rely on from your current email marketing solution?**
Answer:

- Email reporting export with the following fields: Email Name, Last Run, Number Delivered, Kickbacks, Opens, Clicks, Unique Clicks, Subject Line, Unsubscribes, From email, From name, Preheader.
- Email reporting data available via API.

129) **Question Service Group 3: What are the key metrics / reports you expect to be able to monitor?**
Answer: See response to question 128 above.

130) **Question Service Group 3: What are your key objectives for digital marketing/marketing automation**
Answer:

- Increased Recruitment yield.
- Increased Alumni engagement (email clicks, event attendance).
- Increased donations.

131) **Question Service Group 3: What is your current email system(s) being used for today (mass emails, drip campaigns, fundraising, other)?**
Answer: Anthology (iModules) and Outlook.

132) **Question Service Group 3: Are you planning to retire all other email solutions as part of this transition?**
Answer: Yes, eventually JMU would like to utilize a single emailing solution.

133) **Question Service Group 3: Do you have documented personas (prospect profiles / audiences) for your digital campaign work?**
Answer: Not "personas" but we have our audiences segmented in various ways by class year and engagement behaviors.

134) **Question Service Group 3: Describe a typical email campaign. Is it automated? If available, please share a diagram or workflow.**
Answer: No current automation or triggered workflow.

135) **Question Service Group 3: Do you anticipate needing strategy/tactical consultation and support for your email campaign development moving forward?**
Answer: Yes, particularly as we get started, offerors should provide pricing tiers/rates in Section X *Pricing Schedule.*

136) **Question Service Group 3: Will you require multiple IP addresses or domain names? If so, please describe.**
Answer: No.

137) **Question Service Group 3: Can you describe how you manage email subscriptions today (email opt ins/outs)?**
Answer: Unsubscribe links go to a confirmation page for the particular category that the email was sent from, however the page does not show all of the categories to which the person has the option to unsubscribe from.

138) **Question Service Group 3: In addition to email, are you planning on using Social Studio, Mobile Studio (SMS) or Advertising Studio (digital ad management)?**
Answer: JMU is not able to answer this question. A base platform selection has not been made.

139) **Question Service Group 3: How does the department currently make use of social media platforms (Facebook, Instagram, Twitter, Weibo, WeChat etc.) for marketing purposes?**
Answer: Social posts often share links to articles and videos created by teams inside and outside Advancement.

140) **Question: What are the volumes of posts, mentions etc.? How is social listening utilized? How many social media accounts will be managed?**
Answer: Social media management and social listening are both an essential part of our communications and marketing strategy. We currently use two pretty advanced programs for 1) Social Listening [Netbase] & 2) Social Media Management [Falcon.io]. We rely heavily on the capabilities of each of these and are generally happy with how they serve our needs.

For social media management, we have 20 campus partners and 165 channels that currently utilize Falcon.io. for their daily posting and social monitoring/reporting, including the main university accounts. This includes post scheduling, an audience engagement module, content performance tracking/measurement, and audience insights/management capability.

For social listening, we utilize Netbase from an issues management perspective to monitor crisis keywords across. We also utilize this software to track volume and sentiment of conversations related to JMU across social. We use this surrounding communications and marketing campaigns as well as tracking general brand sentiment.

141) **Question Service Group 3: How many text messages and push notifications does the department send to constituents per year?**
Answer: Texting is a relatively new platform for us. We currently have the ability to reach out to up to 40,000 contacts at a given time. During calling shifts, around 200 – 300 contacts are assigned per caller. Campaign specific – we will be leveraging it for 3 targeted campaigns this year (#GivingTuesday, Warden Match and JMU Giving Day 2022).

142) **Question: Will social listening or social media management be a part of your marketing campaigns (for any relevant Service Group)? If so, please describe your Mobile SMS App, the audience it serves, and its purpose. How many users have installed the mobile app? If so, how many social media accounts will be managed?**
Answer: Offerors should detail their related offerings. Yes, JMU considers this relevant, details on current use case may be made available to top offerors in negotiation.

143) **Question: The RFP states 70 advancement individuals, 40 full time academic advisors, and 500 part time faculty advisors. Are these the number of users JMU anticipates will need access to the CRM system?**
Answer: JMU anticipates other users beyond Advancement and Advisors will use the Enterprise CRM. This will include Admissions, other departments on campus and IT/technology administrators and support at a minimum. The expectation is that volume of users will increase over time as more capabilities and business functions are implemented.

144) **Question: What are the number of users currently utilizing/needing full time access to your existing Admissions solution?**
Answer:
The Graduate School Admissions: Application 4, Admit 373, Prospect 7 all within the United States.
Undergraduate Admissions: UG Admissions has 44 full or part time staff. We mainly work in Madison Hall but we do have remote staff in Richmond. We also have student employees. The number varies.
School of Professional & Continuing Education: 10-15 in SPCE and a few external through contract.

145) **Question: How many marketing staff do you anticipate needing access to the system that fall outside of the 70 advancement and 40 full time academic advisors?**
Answer: Response not available at this time. Provide any tiers of users in Section X *Pricing Schedule.*

146) **Question: Has the University had demonstrations or evaluations of CRM solutions within the past 12 months leading up to the publishing of the RFP?**
Answer: See answer to question #6 above.

147) **Question: Does the University currently have a volume license agreement with Microsoft for purchasing Microsoft software licenses?**
Answer: Yes.

148) **Question: Does the university use Azure Active Directory?**
Answer: Yes. JMU does have a broader Identity and Access Management ecosystem beyond Active Directory.

149) **Question: Does all staff use Office 365 and Microsoft Outlook as their web interface?**
Answer: Yes, JMU employees use Office 365 and Outlook for collaboration/office productivity/email needs.

150) **Question: What are your existing data warehouse and reporting solutions? How will this new system interact with those? Are any subject to replacement?**
Answer: JMU Advancement has a data warehouse specifically for Advancement. There is not a university wide enterprise data warehouse currently.

151) **Question Service Group 3: To what do you attribute the lack of USPS addresses?**
Answer: Young alumni moving frequently and keeping parent's address as their home address.

152) **Question Service Group 3: What is driving the change of advancement systems?**
Answer: Current product does not meet all needs.

153) **Question Service Group 3: What are some key initiatives or goals James Madison University (JMU) advancement is working towards in the next 5 years?**
Answer: We will be setting those goals in the next few months as we wrap up our current capital campaign. Fundraising for expendable scholarships and a focus on tracking alumni engagement are high on the list.

154) **Question Service Group 3: When is the next campaign slated to happen?**
Answer: TBD based on timing of the implementation of the new CRM. Management is reluctant to start a new campaign mid-implementation.

155) **Question Service Group 3: What are some key functionalities you / Advancement /IT wish you would have now with the current solution that you would like to have in the new one?**
Answer: Offerors should propose all functionality available.

156) **Question Service Group 3: Who is JMU's preferred technology consultant or systems integrator?**
Answer: JMU does not have a preferred consulting partner or system integrator at this time.

157) **Question Service Group 3: If no portal is currently in use, what would you estimate the daily number of logins to be?**
Answer: We have close to 150,000 alumni.

158) **Question Service Group 3: How many Giving Societies or Giving Circles does currently JMU have?**
Answer: 10 (some have sub-levels).

159) **Question Service Group 3: What is the breakdown of staff? i.e. # of MGO's, front office staff, back office staff etc.**
Answer: See response to question #78.

160) **Question Service Group 3: How many business units/departments will be utilizing the solution?**
Answer: We do not limit access to our Advancement system to Advancement-only departments. There are currently 62 departments represented in our data.

161) **Question Service Group 3: How many constituent records are in the current advancement database?**
Answer: See response to question #71.

162) **Question Service Group 3: Can the University please provide additional details regarding their legacy data to be imported? For example, what is the volume of the records, number of tables, etc.**
Answer: Currently more than 425,000 people or org records and over 1.5M gift/pledge/matching gift records. There are roughly 2,000 tables to migrate.

163) **Question Service Group 3: Re analytical capabilities: Please map the current Databases + current reporting tools and scope what is planned to be replaced by the new project.**
Answer: The university anticipates that the current ecosystem, including Ellucian Advance, Advance Performance, and Cognos are replaced with the Enterprise CRM solution.

164) **Question Service Group 3: When was the last time you did a contact info, employment, wealth screen, or other appends?**
Answer: We do quarterly NCOA washes for address data. It has been several years since we did wealth or employment screening.

165) **Question Service Group 3: Have you been satisfied with the quality of your data appends?**
Answer: No.

166) **Question Service Group 3: Do you feel you spend a lot of time on maintaining data?**
Answer: Yes.

167) **Question Service Group 3: Are you looking to improve the efficiency of your staff in maintaining data updates?**
Answer: Yes.

168) **Question Service Group 3: Is a batch processing of data appends of interest?**
Answer: Yes, we currently do mass updates of data appends in-house and would like to keep that functionality.

169) **Question Service Group 3: Are you interested in customized data analytics to vet your constituents by propensity to give and inclination to give? We can tailor analytics to your fundraising use case.**
Answer: Yes. JMU is interested in what offerors can provide regarding customized data analytics.

170) **Question Service Group 3: What is JMU doing around identity resolution?**
Answer: We have strong programmatic duplicate checking in our current system and would like to keep that functionality in the future.

171) **Question Service Group 3: How does JMU Athletics and JMU Advancement currently share data? How do you want to improve or build upon it?**
Answer: Batch process to import gifts from Athletics to Advancement nightly. Bio data updates are all manual between the two systems. There are many opportunities for improvement here.

172) **Question Service Group 3: Paciolan is a core competency for SSB how do you integrate now with PAC and how do you see integrating in the future?**
Answer: No true integration with Paciolan.

173) **Question Service Group 4: Is an application or supplemental application needed or application portal? Will Collegenet and Slate be replaced by the new CRM?**
Answer: We request offerors provide information on self-service/portal capabilities for applicants.

174) **Question: Given the number of projects (service groups), are implementations concurrent or linear?**
Answer: Yes, expect to work at Advancement and Advising in parallel.

175) **Question: Beyond this RFP – in the future after this project is complete, HR system other integrations and scopes that are not listed that might tie into the CRM?**
Answer: Yes, but it is not the primary scope of the RFP at this time.

176) **Question: Is JMU pursuing only systems that can offer the wholistic response, vs an offeror for one area (e.g. Advancement)?**
Answer: JMU is looking for an Enterprise CRM platform, ideally in a single environment with a single data model. We do expect integrations with other systems will be needed.

177) **Question: Are subscription based platforms acceptable (SaaS)?**
Answer: Yes, cloud based, SaaS is acceptable.

178) **Question: Data governance, how does JMU anticipate the "people" parts of the project being successful.**
Answer: We have a data governance workstream in progress that is working at scenarios and data definitions. Our broader Steering Committee drives key decisions.

179) **Question: Does JMU want one environment or multiple data silos by area?**
Answer: Ideally the university would like a single environment and data model.

180) **Question: Does JMU intend to replace their central marketing platform?**
Answer: With Advancement and Advising going first it would include their marketing efforts. JMU is open to recommendations on phasing.

181) **Question: One-stop-shop portals – expand on how JMU wants to engage each group.**
Answer: Presently JMU links the majority of Faculty/Student items in one location. We do not have Alumni information included. Some of the tools like registration are exposed in the student portals. We are student focused and will continue that philosophy. The goal will be for constituents to need to go to less total places to access relevant data.

182) **Question: SPCE does JMU want course registration as functionality?**
Answer: JMU's use of PeopleSoft only has credit bearing courses. PCE uses Aceware and registration would be a component of interest to SPCE. SPCE has many programs for K-12 and other groups that are not managed in our Student System.

183) **Question: Can JMU expand on the Advising use case? Course, grade, attendance, early intervention desires?**
Answer: JMU needs for Advising use case are indicated in Section IV.C. Service Group 2: Academic Advising, Student Success, and Early Alerts. Offerors should detail in their response what they can offer in this area. JMU does not have overarching functionality in this area at present. Different areas use different methods to reach out (e.g. texting platforms, and midterm grade prompts to professors).

Signify receipt of this addendum by initialing *"Addendum #1_____"* on the signature page of your proposal.

Sincerely,

Colleen Johnson
Buyer Senior
Phone: 540-568-3137