



**Questions and Responses # 1
Implementation of Technolutions/Slate CRM
Project No. TU-2316**

November 7, 2022

Procurement
8000 York Road
Towson, MD 21252-0001

Ladies and Gentlemen:

Below are questions and responses to aforementioned solicitation. Any response resulting in a revision to the solicitation will be included in an Addendum.

Questions:

- Q1.** What system is currently used for receiving applications for admission?
- A1.** **Common Application is used for applications.**
- Q2.** Please confirm that Slate is replacing the current application for admissions.
- A2.** **Common App will still be used in conjunction with Slate Applications**
- Q3.** How many distinct applications for admissions will be created in Slate?
- A3.** **2 distinct applications – freshmen and transfer applications.**
- Q4.** On page 10, para II- the RFP states “the CRM to be implemented by January 1, 2023. Later in par IV, item B- it states “implementation service for one year (January 2023-January 2024). Please clarify what is to be implemented by January 1, 2023.
- A4.** **The project is kicking off in January 2023. The implementation services for year 1 will be from January 2023 – January 2024.**
- Q5.** On page 11, para 1.f- What historical data is being migrated to Slate? Data from Salesforce/Target X or some other source?
- A5.** **Salesforce data will be migrated to Slate.**

Q6. Will Slate replace any of the current functions of Ellucian Advance?

A6. **Ellucian Advance will continue to be used. It is listed for reference purposes only.**

Q7. On Exhibit L- does “Web Portal Implementation” refer to the Slate portal or something else?

A7. **Slate portal functionality will be a part of the year 1 implementation.**

Q8. This appears to be a very large and complex project. Without specific knowledge of the project details, it will be difficult to provide accurate Year 1 costs. In such situations, cost estimates are typically high. Will there be an opportunity to revise costs after more is learned on the project specifics?

A8. **Bidders have the ability to add additional services other than those identified in the bid sheet. The project details are defined in the scope of work section of the solicitation. Bidders were required to submit any questions they had pertaining to the solicitation to ensure its understanding of the scope.**

Q9. Will Slate replace any of the current functions of Ellucian Advance?

A9. **See Response to Question #6.**

Q10. Does the University anticipate integration between its current Salesforce environment and Slate? If yes, what level of integration will be required?

A10. **Yes. The University anticipates integration between Salesforce and Slate. As part of the implementation services we are requesting, we are asking for recommendations of best practices of how to architect the integration.**



Q11. Does the University anticipate a Slate hosted application for the Undergraduate and/or Graduate schools?

A11. **The implementation services only covers year 1, in which undergraduate admissions will be implemented. Year 2 may include graduate, but this is out of scope for this specific procurement.**

Q12. Will there be separate Slate instances for the Undergraduate and Graduate schools, or are both schools sharing an instance?

A12. **Graduate will be a future implementation and is not covered in year 1. The selected vendor should help to further define the future roadmap and implementation of Slate which is listed in the IFB.**

Q13. The IFB mentions assisting TU in data mapping. Can you clarify the definition of “data mapping activities”? Is this referring to filling in the Slate-side data layouts or will you need full configuration services to include source formats, data export queries, automated data exchange, etc.?

A13. **Towson University is fully staffed for the project including resources within the Admissions IT operations and central IT and will be responsible for the configuration of data mapping. TU will be responsible for configuration but will be looking for assistance on the Slate layout.**

Q14. Regarding the approximately 200 lead sources, can you describe the frequency and number of unique lead sources? For example, would you count 10 college fair imports as 10 difference sources or 1 source?

A14. **It all depends on Slate capabilities. It would be ideal to have a parent code that is broader i.e. College Fair, and then have a sub code that is more specific i.e. Mid-Atlantic NACAC College Fair but until we understand the capabilities and what our purpose/need to record the source, it could be one or the other.**

Q15. What existing systems do you anticipate replacing with Slate and which will survive in their current form? For example, you note that TargetX is currently being used for campus events and current mass email sends and Marketing Cloud is being used to support student communication journeys. Is the intent to migrate these activities to be handled in Slate?



A15. The activities currently served by both TargetX and Marketing Cloud will be handled in Slate for undergraduate admissions. The intention is to fully implement Slate and consolidate the Admissions operations into Slate. Target X and Marketing Cloud will continue in their current form for graduate admissions communications.

Q16. 1a: Create personalized communications and dynamic content for prospects and inquiries, including configuration of multi-channel communications as needed. Will the content, templates, and audiences be provided by Towson? Is there an expectation for the implementer to deliver communication strategy or content for the messages?

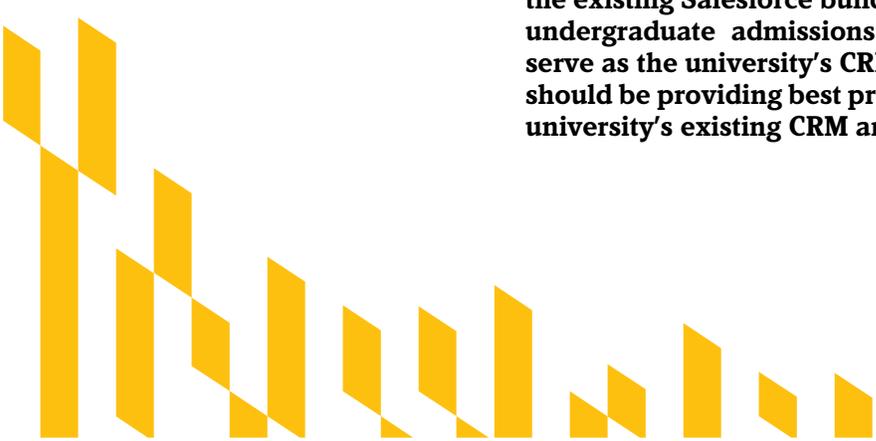
A16. Towson University will provide content, template examples, and audience segmentation parameters. There is no expectation for the implementation partner to deliver strategy or content, but there is an expectation to provide Slate training, best practices, requirements on the methodology for delivery of communications.

Q17. 1c: Replace the legacy Towson University Enrollment contract with new payment process and route students to applicant portal for to-do- list of tasks. In the requirement for a new payment process, is the intention to use Slate-hosted payments, or will there be an integration requirement with a campus payment provider?

A17. Towson University uses TouchNet for payments and the new contract payment process will also need to use TouchNet.

Q18. 3a-b: Will the noted Salesforce Org be sunset post go-live of Slate CRM? Will other offices continue to use the Salesforce Org, and what integration between Slate and Salesforce will be required? Can you clarify the future-state of the Salesforce environment relative to undergraduate and graduate admissions?

A18. Year 1 is only for undergraduate admissions. Given the timeline, both the existing Salesforce buildout and Slate will be used for graduate and undergraduate admissions respectively. Salesforce will continue to serve as the university's CRM. Per the IFB, the responding vendor should be providing best practices for using Slate as an extension of the university's existing CRM architecture.



Q19. Section IV, subsection II. It states, "This contract shall begin on or about November 30, 2022 with the CRM to be implemented by January 1, 2023 and continue for a period of one (1) year." Please clarify the expectation of the implementation timeline. This would appear to have a very brief timeline of only weeks (including the holidays) for the implementation of Slate, which is an extremely limited amount of time to perform a project of this nature. Am I misinterpreting that timeline? Do you mean that the contract would be signed by November 30th and that the actual project would kick-off at the beginning of the year and last one year?

A19. The implementation services being sought will be for 1 calendar year; January 2023 – January 2024.

Q20. It appears that the implementation request is for undergraduate admission. Confirming that Towson is not also looking for a graduate implementation. If looking for both, will they be housed in the same database?

A20. See Response to Question #11.

Q21. Question 1a reads "Create personalized communications and dynamic content" -- Is Towson looking for the selected provider to write copy and design emails as a component of this work or is the request to implement existing design/copy?

A21. TU does not need someone to craft communications, but provides best practices, training, and methodology for delivery. There are pieces of existing communications content to be recreated in Slate.

Q22. Is Towson currently or does Towson intend to run search in-house?

A23. Yes. The University plans to run in-house search.



Q24. With regard to the one-year roadmap, would it be appropriate to include pricing for future considerations on Slate optimization (e.g., branded portals) to enhance the student experience?

A24. The IFB for Slate implementation services only covers year 1.

Q25. Given the unique scope of services and unknown MBE providers for this specialized CRM implementation work, would the University consider a waiver of the 5% MBE requirement?

A25. The University has reviewed the Maryland Department of Transportation Minority Business Enterprise (MBE) Directory of certified minority businesses and has determined the vendor pool is sufficient to substantiate a 5% MBE requirement for this procurement.

Q26. Please provide greater clarity on the Slate integrations with Salesforce and Target X systems. It is our understanding Slate would replace functionality of both of these existing systems. How does the University envision Slate implementation complementing these solutions?

A26. TargetX and the admissions processes related to undergraduate admissions would be replaced. Per the IFB, Slate will be used as an expansion of the University's existing CRM architecture. We anticipate that there would continue to be integration between Salesforce and Slate as we use Salesforce for students.

Q27. Can companies from outside of the USA apply for this (ie: India or Canada)?

A27. Vendors are expected to be available during core TU office hours 8-5pm EST Monday-Friday.

Q28. Does the awarded company have to attend meetings on-site?

A28. No. The awarded company will not need to attend meetings on-site. Virtual conference tools such as Webex Meetings will be used.

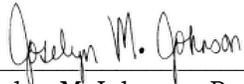


Q29. Can the services be performed outside of the United States?

A29. **Vendors are expected to be available during core TU office hours 8-5pm EST Monday-Friday.**

Q30. Can emails be submitted via email?

A30. **Yes. See Section III.A.2 of the solicitation.**

Issued by: 
Joselyn M. Johnson, Procurement Officer

