

**REQUEST FOR PROPOSALS #20090
CUSTOMER RELATIONS MANAGEMENT SYSTEM**

**ADDENDUM #1
November 26, 2019**

Vendors who attended the Mandatory Pre-Bid Conference and who are eligible bidders:

VENDOR NAME	ADDRESS
Healthcare Management Solutions LLC	1000 Technology Drive, Suite 1310, Fairmont, WV 26554
MERP Systems. Inc.	2201 Cooperative, Suite 600, Herndon, VA 20171
Enovational	1101 K St., NW, Suite 1010, Washington, DC 20005
Attain LLC	1600 Tysons Boulevard McLean, VA 22102
Salesforce	11720 Plaza America Drive, #800, Reston, VA 20190

As a general point of clarification, the following information is provided:

The Customer Relations Management System is intended to manage all communications for the Division of Financial Aid. It is intended to work in conjunction but not integrated with our current homegrown system. The data that populates the homegrown system comes from Oracle tables. The Customer Relations Management System needs to have the ability to organize incoming communications and the ability to manage, process, and track outgoing communications. Part of the expectation for the Customer Relations Management System is a student portal in which students can log in to view their status, make updates or edits to their information, upload documents, etc.

The Customer Relations Management System is not intended to manage awards or process payments. We already have electronic applications built for each financial aid program that were designed and maintained internally.

All questions received by the deadline have been answered. Please see the next pages.

Questions and Answers:

#	RFP Section	Page #	Question
1	4.1.c	6	Is the integration with Oracle read only or read and write? What is the version of Oracle database? We are assuming the database is sitting behind a firewall. Will the agency ensure proper access to a cloud-based solution?
			We are currently using Oracle 12c. We would prefer not having direct connections to our database and to have the information reside in the cloud, provided the proper security and encryption concerns are addressed. However, we are open to alternatives.
2	4.2.b and 4.2.c	6	Would the Government like to know if the proposed solution supports CTI integration or would the Government actually like the vendor to perform the integration? If it's the latter, would the Government please provide more information regarding the telephony system that the agency is currently using?
			We would like the vendor to be able to perform the integration. We are currently using Cisco HCS through Verizon. The state contract is set to expire October 1, 2020 when the state may be going with a different phone system. We would delay implementation of the CTI integration until after October 1, 2020 when a new phone system may be installed.
3	4.2.g General Requirement	7	To what extent does the Government want Outlook to be integrated with the new CRM system? Would the Government please clarify if they would like the CRM system to integrate with the desktop Outlook client or are if they looking for integration with an email system to send outgoing emails?
			The WVHEPC would like the CRM system integrated with the desktop Outlook with a plugin for Office 365 to be able to attach e-mail communications to a student record in the CRM system. We also want the CRM system to be able to send outgoing e-mails as if it is coming from the WVHEPC. We would want the CRM system to have compatibility with current SPF, DKIM, and DMARC standards when sending e-mail and would welcome any increase in the level of protection these technologies provide to our e-mail domain.
4	4.2.u General Requirement	8	Is the question regarding maximum concurrent users related to system's ability to handle a large number of users or is it pertaining to number of licenses?

			This question is in relation to number of licenses and if there is a maximum number of licenses that can be logged in at the same time.
5	4.2.a Student Portal	8	What single sign on system are the students currently using? Can you elaborate on what existing credentials are?
			We currently have a homegrown portal that applicants can log into. The applicant creates a username and password when they apply. Currently, the username is their e-mail address and the applicant creates a password that allows them to log into the portal and view their application, make edits to their application, and view their application status for one of our programs.
6	4.6.g	10	Do any of these systems referenced in section 4.6.g (Campus Logic, Ocelot (FATV), ECSI (heartland)) have APIs? Are these systems web-based?
			Campus Logic and Ocelot (FATV) are web-based. ECSI is not web-based. Each vendor has capability to exporting data in excel/csv format but we are not aware if each vendor has an API.
7	5.7	11	Would the Government accept vendor experience implementing multiple CRM systems with similar functionality as a substitute for actual experience with higher education clients?
			While there is no requirement that a vendor have higher education experience in order to submit a bid, preference will be given to vendors who do have experience in higher education.
8	General Question	6-11	The RFP often asks “Does the CRM have the ability...”. Are these requests meant to just ensure the system has the capability or are you looking for the actual feature to be implemented? As such, would the Government like proposal responses to these requests?
			In those instances, we would like to implement those features and want to know if the system has that capability. We would like the proposal to contain these features if the system is capable.
9	General Question		Will the Government please give an estimated maximum user count for the internal WVHEPC Division of Financial Aid employees that will need access to the future CRM system?
			The WVHEPC is estimating that there will be 12 maximum internal users that would access the CRM system.
10	General Question		Per the conference call, it looks like most of the aid is processed from the College of West Virginia Foundation’s web site. Are

			there any scholarships NOT processed by/through CWVF that need to be tracked?
			We are looking for a communications management system to manage communications with students who apply for our programs, we are not looking for a system to manage the awards, funds, etc. We have a homegrown system that manages the awards and funds. All the programs we administer are listed on the CFWV web site.
11	General Question		How many ISIR's does WVA process yearly? You mentioned 200,000 on the call, does this include correction ISIRs? On a yearly basis, how many unique students are accessing their awards who will need to be tracked by the CRM system? Can awardees access their information past their graduation?
			For 2019-20 we had received over 270,000 ISIR transactions from over 160,000 individual students. There would be an estimated 40,000 students that we award each year; not all would access the student portal. Some awards require a post-graduation service requirement that would require them to submit documentation after graduation that we would need to track. We would like the student to be able to access the portal to track their service requirement.
12	General Question		How many high schools are planning to use the system? How many high school students?
			We are not anticipating high schools accessing this system as we have a homegrown system that high schools log into that will remain separate from this system. There would be around 14,000 high school students that may access the system each year, not including current college students, non-traditional students, and those fulfilling post-graduation service requirements.
13	General Question		Can you please provide a little more information on the system behind the Oracle tables. What are the technologies of this system? When was this system built and under what technologies? For example, what version of Oracle are you running? Is this system cloud based or on-premise? What are the names/functions of and how many tables will need to be integrated with? Are these integrations expected to be batch or real-time? Is there a preferred method/vendor for integration to/from the Oracle Tables? What vendor built the system? And would/will that vendor be allowed to propose on this CRM RFP?
			We have a custom/home grown system built around C#/ASP.net/Oracle 12c that is all on-premise. It has been developed and maintained in-house for 10+ years. While the integrations would be nice to have in real-time, the expectation is that they would be batch. See question #1.

14	General Question		Who is the current phone/CTI vendor and their product? When do you expect this integration to go-live?
			We are currently using Cisco HCS through Verizon. The state contract is set to expire October 1, 2020 when the state may be going with a different phone system. We would delay implementation of the CTI integration until after October 1, 2020 when a new phone system may be installed.
15	4.2.n	7	Describe the user interface. Is it customizable per user? Can you elaborate on what you mean by a “customizable per user”?
			We will have up to 12 internal users. Each user will have different responsibilities for managing different programs. Does the interface allow a user to develop a home screen that may have dashboard reports that are unique to that user and quick links to different sections of the system that a person uses frequently or is it a standard interface that cannot be changed based upon the user?
16	General Question		What DevOps tools are used by the State? Is there a preference for tools like GIT, JIRA, etc.?
			None and no preference.
17	General Question		Approximately how many electronic signatures do you require from this application?
			We do not anticipate anyone having to sign anything electronically, but we do anticipate there may be up to 40,000 individual students who may at some point log into the student portal to view the status of their award or service requirement post-graduation.
18	General Question		Does the state have a preference or have already selected a CRM product? If so, what is it?
			No, there is not a preference or a product that has already been selected. We are looking for a product that can meet our needs and have the capability of adapting and expanding.
19	General Question		Please provide a list of all back-end systems that the state anticipates the Student Portal to interface with? Are interfaces with all backend system expected to be priced as part of the bid response?
			There are two systems that we would want to interface with, Campus Logic is the system we use to send out award notifications to students via e-mail and text. Heartland ECSI is the system that is used to track post-graduation requirements for four of our programs and collects payments if students are not meeting the post-graduation requirements which requires the student to pay back the award. Initially, we would, at a minimum,

			want the capability of batch uploading a CSV file with the information from Campus Logic and Heartland ECSI into the CRM system and student portal.
20	Pricing Page		Are licenses for the CRM to be included in the pricing response? If so, how many licenses does the state want to be priced? We don't see that in the Pricing response?
			The WVHEPC is estimating that there will be 12 maximum internal users that would access the CRM system. We would want the cost of the licenses included in the pricing. SEE ATTACHED UPDATED PRICING SHEET
21	General Question		Is there a requirement for the project to be done on-site, or can some of the work be developed remotely?
			No, there is no requirement for the project to be done on-site.
22	General Question		Approximately when or during what aid year are you planning to go-live with the new CRM?
			We have not established a timeline for implementation as there are several pieces and would work with the vendor to establish reasonable timelines based upon what makes sense and understand that it may be rolled out in stages. The vendor can provide an estimated timeline based upon similar projects.
23	General Question		Will the CRM system be expected to process refund requests for students (if that event should occur)?
			No, the CRM system will not process payments. The only purpose is communications and to have the student portal to be able to communicate with students. The CRM is not expected to award students or process payments. It is not expected that high schools or colleges would access the CRM.

ATTACHMENT 1

VENDOR RESPONSE COST SHEET UPDATED 11/25/2019

Vendor is to provide costs as outlined below. Explanations for the costs may be provided on additional sheets. If a category below does not apply to your bid, you may put N/A (Not Applicable).

Deliverable	Cost	Page Reference to Cost Detail
CRM development		
CRM integration with Oracle system currently in use by the Commission		
Telephone Integration		
Student Portal which supports a minimum of 30,000 log ins		
Product usage for 12 users (Any licensing costs would be indicated here.)		
Initial system training		
Estimated annual cost per year after system installation and training		
On-going system training after initial start-up		
Hourly fees for assistance after start-up		
Other Detail any of any costs not captured above.		