

Addendum 1

RFP - Customer Relationship Management (CRM) System - DSU260612-CRMSYSTEMS

Questions and Answers

The work/ clarification/ answers listed in this addendum shall be considered part of the Bid/ RFP document for the referenced project/ product/ services, etc.

Below are questions and answers regarding subject RFP. All questions are written in black color font and the **answers are provided in red color font.**

Question 1: Tuesday 7/7/2026 10:11 am

1. Section number: IV.C, Paragraph number: 23 (Business References), Page number: 12 (see also Attachment 4, Page 31), Text of passage being questioned: "Provide at least three (3) business references consisting of current or previous customers of similar scope and value using Attachment 4."

Question: Where a proposal is submitted by a prime vendor supported by a named implementation partner disclosed on Attachment 5 (Subcontractor Information Form), will the University accept business references drawn from the combined proposing team — that is, current or previous customers of the prime vendor and/or its named implementation partner(s) for work of similar scope and value — in satisfaction of the three-reference requirement on Attachment 4, provided each reference clearly identifies which team member performed the work?

Response: Yes, the University will accept combined business references.

2. Section number: Appendix B, Paragraph number: D.3 (No Limitation of Liability for Certain Data Breaches), Page number: 51, Text of passage being questioned: "Notwithstanding any other provision of this contract, there shall be no monetary limitation of vendor's liability for the vendor's breach of its obligations under this contract which proximately causes a (1) Covered Data Loss or (2) Covered Disclosure, where such Covered Data Loss or Covered Disclosure results in any unauthorized public dissemination of PII."

Question: Will the University consider, during contract negotiation, an alternative liability structure for Covered Data Loss or Covered Disclosure of PII — for example, a liability cap set at a defined multiple of the total contract value, or at the limits of a cyber liability insurance policy maintained at or above the

levels specified in Appendix B, Section E — in lieu of unlimited monetary liability? If the University will not negotiate this provision, please confirm whether recording an exception to Paragraph D.3 on Attachment 2 would, by itself, render a proposal non-responsive or otherwise exclude it from evaluation.

Response: Vendors may submit proposed exceptions or alternative liability structures for Paragraph D.3 using Attachment 2. Any proposed liability cap or modification is subject to University Legal and Procurement review and does not guarantee acceptance. The impact of an exception on proposal responsiveness or eligibility for award will be determined by the University in accordance with the RFP and applicable procurement requirements.

3. Section number: Attachment 7, Paragraph number: Section 2 and Section B.1 (Financial Statements & Condition; Financial Stability and Responsibility), Page number: 37, Text of passage being questioned: "The University requires all Offerors to demonstrate adequate financial capacity to perform the obligations of any resulting contract. At a minimum, Offerors must provide web link/ electronic copies of: Audited financial statements web link from where University can get the most recent fiscal year."

Question: For an Offeror that is a recently formed limited liability company without audited, reviewed, or compiled financial statements for a completed fiscal year, will the University accept alternative evidence of financial capacity — such as internal financial statements, bank references or letters of good standing, and the financial statements of a named implementation partner — as satisfying the financial responsibility requirement, consistent with the "Internal financial statements" and "Other" options listed in Attachment 7, Section 2?

Response: If any institution does not meet the required information in Attachment 7, the University will not be able to accommodate them.

Question 2: Thursday 7/16/2026 11:14 am

1. Section number: I, Paragraph number: Overview / Introduction, Page number: 44.

Text of passage being questioned: "Delaware State University is soliciting proposals for Customer Relationship Management (CRM) System."

Question: Is this procurement intended to replace an existing CRM or recruitment platform, or is it a net-new implementation? If a replacement, please identify the incumbent CRM/recruitment system(s) currently in use, along with the approximate go-live date of any prior implementation.

Response: Yes. We will be replacing the existing CRM. Go live date was November 2022.

2. Section number: 3.1, Paragraph number: CRM Functional Requirements, Page number: 45.

Text of passage being questioned: "The proposed CRM solution must support end-to-end lifecycle management for multiple student populations, including undergraduate, graduate, transfer, online, international, adult, and dual enrollment students."

Question: Should all listed student populations (undergraduate, graduate, transfer, online, international, adult, and dual enrollment) share a common recruitment and admissions process, or does each population require distinct stages, applications, checklists, communications, and counselor teams?

Response: No, they all require distinct stages (different communication plans).

3. Section number: 3.1, Paragraph number: CRM Functional Requirements, Page number: 45.

Text of passage being questioned: "The proposed CRM solution must support end-to-end lifecycle management for multiple student populations."

Question: What are the estimated annual volumes (prospects, inquiries, applications, admits, deposits, and enrollments) for each student population identified above? This information is needed to size the proposed platform and licensing tiers appropriately.

Response: Undergraduate-50k prospects, 15k inquiries, 20k applications, 8.5k-10k, admits, 2k-4k deposits, 10k enrollment. Graduate-25k prospects, 15k inquiries, 2k-7k applications, 3k-5k admits, 500 deposits, enrollment.

4. Section number: 3.2, Paragraph number: Admissions and Recruitment Management, Page number: 45.

Text of passage being questioned: "Application workflow management, including initiation, completion tracking, and checklist monitoring."

Question: Is the selected CRM expected to provide the student-facing online application form and applicant portal, or will applications continue to be submitted through an existing, separate application system (e.g., Common App, CAS, or a legacy portal)?

Response: No, we will continue to receive applications through existing, separate application systems.

5. Section number: 3.2, Paragraph number: Admissions and Recruitment Management, Page number: 45.

Text of passage being questioned: "Application workflow management, including initiation, completion tracking, and checklist monitoring."

Question: Does the CRM need to integrate with a payment platform to process enrollment deposits and application fees? If so, please identify the current payment processor/gateway.

Response: Yes.

6. Section number: 3.3, Paragraph number: Enrollment Funnel and Yield Management, Page number: 45.

Text of passage being questioned: "Behavioral triggers and automated outreach workflows."

Question: Can the University provide representative examples of the behavioral triggers it expects the CRM to support (e.g., specific student actions, inactivity thresholds, or milestone events) that should initiate automated outreach, counselor tasks, or alerts?

Response: Apply Now, Early Admit, Housing Deposit notification, Event registration call to action, No action/idle application, etc.

7. Section number: 3.3, Paragraph number: Enrollment Funnel and Yield Management, Page number: 45.

Text of passage being questioned: "Tools to identify and mitigate enrollment melt."

Question: How does the University currently define and measure enrollment melt, and what tools or processes (if any) are presently used to track and mitigate it?

Response: The university defines and measures enrollment melt via our Institutional Research team supported by internal systems.

8. Section number: 3.4, Paragraph number: Student Service and Case Management, Page number: 45.

Text of passage being questioned: "Support for self-service and knowledge base integration, where applicable."

Question: Does the University require a student-facing self-service support portal (e.g., for submitting requests, checking case status, updating information, and accessing knowledge-base articles), or is case management intended primarily for internal staff use?

Response: Yes.

9. Section number: 4, Paragraph number: System Integration Requirements, Page number: 46.

Text of passage being questioned: "The proposed CRM solution must integrate seamlessly with core University systems."

Question: Does the University currently use an enterprise integration platform, ETL tool, or API-management layer (e.g., MuleSoft, Boomi, Workato) that the CRM implementation should leverage, or is point-to-point integration expected?

Response: Not at present; moving in that direction. Currently SFTP CVS files from CRM to Banner.

10. Section number: 4.1, Paragraph number: Student Information System (SIS) Integration, Page number: 46.

Text of passage being questioned: "The Contractor shall provide bi-directional integration with the University's Student Information System (SIS), enabling synchronization of student biographic, academic, and enrollment data."

Question: For the required bi-directional SIS integration, what specific data domains and fields must flow from the SIS to the CRM (versus CRM to SIS)? Please also identify the University's current SIS platform and version.

Response: The University uses Ellucian Banner System.

11. Section number: 4.1, Paragraph number: Student Information System (SIS) Integration, Page number: 46.

Text of passage being questioned: "Real-time or near real-time data transfer using secure methods."

Question: Which specific integration transactions require true real-time processing, and which may run on a scheduled or batch basis? A representative list of transaction types and their required latency would help vendors architect the appropriate integration pattern.

Response: Applications, Test Scores, Housing Deposits and any enrollment related fees.

12. Section number: 4.3, Paragraph number: Reporting and Analytics, Page number: 46.

Text of passage being questioned: "Export or integration with institutional reporting and business intelligence tools."

Question: What institutional reporting or business intelligence platform is currently in use (e.g., Power BI, Tableau)? Is integration with this existing platform a requirement, or is native CRM reporting/analytics acceptable to fulfill this requirement?

Response: The University currently utilizes internal reporting systems. We would like the CRM reporting/analytics to fulfill the requirement.

13. Section number: 5, Paragraph number: Omnichannel Communication Requirements, Page number: 46.

Text of passage being questioned: "Email campaigns and automated messaging. SMS/text messaging compliant with applicable regulations."

Question: What are the estimated monthly and annual volumes for marketing emails, transactional emails, and SMS messages? This is needed to size communication-platform licensing and throughput requirements.

Response: **Monthly-** 10-15 marketing emails, 4-8 transactional emails, 10-15 SMS messages. **Annual-** 120-180 marketing emails, 48-96 transactional emails, 120-180 SMS messages.

14. Section number: 5, Paragraph number: Omnichannel Communication Requirements, Page number: 46.

Text of passage being questioned: "Email campaigns and automated messaging. SMS/text messaging compliant with applicable regulations."

Question: Which email and SMS platforms does the University currently use for admissions and enrollment communications, and is the intent to retain, replace, or integrate with these platforms?

Response: The university currently uses its SIS platform for enrollment communication email.

15. Section number: 5, Paragraph number: Omnichannel Communication Requirements, Page number: 46.

Text of passage being questioned: "Call activity logging and communications tracking."

Question: Please clarify the intended scope of "call activity logging": does this mean manual logging by counselors within the CRM, integration with an existing telephony/contact-center system, or implementation of a CRM-native contact-center capability?

Response: The option to do both.

16. Section number: 7, Paragraph number: Security, Compliance, and Accessibility, Page number: 47.

Text of passage being questioned: "Role-based access control and audit logging."

Question: Does the University require support for a specific authentication standard or identity provider for staff login (e.g., SAML/OIDC-based single sign-on via Azure AD or Okta)? Please confirm whether SSO is a mandatory integration.

Response: Yes

17. Section number: 8.1, Paragraph number: Implementation Services, Page number: 47.

Text of passage being questioned: "Data migration support, where applicable."

Question: Is there a specific data-migration tool or method the University requires, and is there a defined retention/compliance requirement for how many years of historical data must be migrated into the new CRM? Please also indicate which legacy data sets (e.g., prospects, applications, communications history) are in scope for migration.

Response: Current policy is slated to retain documents for 5-7 years. The following data legacy sets will be requested in the scope of migration (e.g., prospects, applications, communications history)

18. Section number: N/A, Paragraph number: Evaluation Criteria — Enrollment Yield & Operational Efficiency, Page number: 14.

Text of passage being questioned: "Includes analytics, dashboards, and predictive modeling to support enrollment forecasting, funnel outcomes, and efficiency in daily operations."

Question: What specific predictive outcomes does the University expect the CRM to deliver (e.g., likelihood to apply, application-completion risk, likelihood to deposit, or melt risk)? Is native AI/predictive-modeling capability a mandatory requirement, and does the University currently use any

AI/ML tools for enrollment forecasting that the proposed solution should complement or replace?

Response: Specific predictive outcomes are likelihood to apply, application-completion risk, likelihood to deposit, and melt risk). The university currently does not have any AI/predictive modeling; we plan to integrate and propose solutions included in the CRM.

19. Section number: D.5.n, Paragraph number: Vendor Activity, Page number: 22.

Text of passage being questioned: "No activity is to be executed in an offshore facility, either by a subcontracted firm or a foreign office or division of the vendor."

Question: Does the offshore-activity restriction apply solely to personnel directly assigned to the DSU implementation and support engagement, or does it also extend to underlying cloud hosting infrastructure and any incidental technical support (e.g., 24/7 follow-the-sun support or platform-vendor infrastructure) that may involve non-U.S. locations?

Response: The university prefers onshore staff, but offshore staffing is allowed.

20. Section number: Attachment 6, Paragraph number: Pricing Sheet, Page number: 33–35.

Text of passage being questioned: "User Licenses... Hosting / Storage... Additional Integrations."

Question: To ensure pricing comparability across vendors, can the University provide target quantities/assumptions for: (a) internal (staff) user licenses, (b) external applicant/student users, (c) monthly/annual email and SMS volumes, (d) data and file storage, (e) number of environments (e.g., sandbox, UAT, production), and (f) number and type of integration transactions?

Response: A: 30 Licenses B: 20-35k annually C: **Monthly-** 10-15 marketing emails, 4-8 transactional emails, 10-15 SMS messages. **Annual-** 120-180 marketing emails, 48-96 transactional emails, 120-180 SMS messages. D: N/A E:3x (production, UAT and sandbox F: One interface with Banner with 8 file transactions.

Question 3: Wednesday 7/22/2026 9:10 am

Question 1

Section number: IV, Professional Services RFP Administrative Information Paragraph number: B13, Multi-Vendor Solutions (Joint Ventures) Page number: 10

Text of passage being questioned: "The "prime contractor" must be the joint venture's contact point for the Delaware State University and be responsible for the joint venture's performance under the contract, including all project management, legal and financial responsibility for the implementation of all vendor systems.

Question: Our platform does not require an external implementation partner and provides the tools necessary for self-driven implementation by the institution. Our firm only refers institutions to external partners if they require enhanced implementation services. Would DSU accept a platform-only proposal

in which DSU leads implementation internally, with the vendor providing standard platform support, documentation, and training resources?

Response: Yes, we would; however, what does the self-driven implementation include?

Question 2

Section number: V. RFP Evaluation Process, 5. Oral Presentations Paragraph number: 5 Page number: 16

Text of passage being questioned: "Selected vendors may be invited to make oral presentations to the Evaluation Team... All of the vendor's costs associated with participation in oral discussions and system demonstrations conducted for the Delaware State University are the vendor's responsibility."

Question: If selected for an oral presentation or system demonstration, will DSU permit vendors to conduct the presentation and demonstration remotely via video conference, or does DSU require in-person attendance? If remote demonstrations are permitted, please confirm any preferred platform, time limits, attendee expectations, and technical requirements.

Response: Virtual and/or in-person attendance for demonstrations is acceptable. However, 1-2 sessions would be permitted to be only in person.

Question 3

Section number: Appendix A, Section 3.2 Admissions and Recruitment Management; Attachment 6 Pricing Sheet Paragraph number: Section 3.2 / Attachment 6 Page number: 45 and 33

Text of passage being questioned: "Application workflow management, including initiation, completion tracking, and checklist monitoring" and "Please clarify in detail all costs/fees that will be charged to the University..."

Question: To ensure that we quote the appropriate pricing tier and avoid over- or under-estimating costs, please provide DSU's annual application volume by student population for the most recent completed admission cycle, including undergraduate first-year, transfer, graduate, online, international, adult, and dual enrollment applications. If available, please also provide projected annual application volumes for the initial contract term and optional renewal years.

Response: undergraduate first-year:21,600, transfer: 1100 , graduate:700 , online:2500 , international:1300, adult:500 , and dual enrollment: 250

Question 4

Section number: RFP Submissions / Response Instructions Paragraph number: All Vendors response instructions Page number: 2

Text of passage being questioned: "Electronic response should have only one file in total... Aggregate size of your response without compressing the file must not be more than 5 megabytes... Deviation from this limit will be an automatic cause for rejection of your response."

Question: Will DSU permit required attachments that may materially increase file size, such as notarized forms, pricing sheets, W-9 forms, references, and financial documentation, to be submitted outside of the single PDF response file or excluded from the 5 MB aggregate file-size limit? If not, please confirm that all required proposal materials must be included in one uncompressed PDF file under 5 MB.

Response: No. All required proposed materials must be included in one uncompressed PDF file under 5 MB.

Question 5

Section number: Appendix A, Section 8. Implementation and Project Management; Schedule of Events
Paragraph number: Section 8.1 / Schedule of Events Page number: 47 and 4

Text of passage being questioned: “The Contractor shall provide... project management and implementation planning... system integration, testing, and deployment... User Acceptance Testing (UAT) support” and “Projected Contract Start Date October 01, 2026.”

Question: Does DSU have a target go-live date, phased rollout expectation, priority student populations, or required admissions cycle milestone that vendors should use when proposing implementation timelines, project staffing, training, and deployment approach?

Response: Target go-live date March 1, 2027. Implementation should be completed before this date to ensure training for staff and enrollment timelines.

Question 6

Section number: Appendix A, Section 8. Implementation and Project Management Paragraph number: Section 8.1 Implementation Services Page number: 47

Text of passage being questioned: “The Contractor shall provide... Data migration support, where applicable.”

Question: Appendix A references data migration support “where applicable.” Please clarify what legacy CRM, inquiry, application, event, communication, and case-management data DSU expects to migrate, including approximate record volumes, source systems, historical years, attachments/documents, and data-cleansing responsibilities.

Response: DSU would bring in applications, events, communication, and case management, with applications upward of 25,000 for the FY27/28 academic year from the current CRM legacy system.

Question 4: Wednesday 7/22/2026 2:35 pm

Section number Section II (Scope of Work/Services), read with Attachment 6 (Bid/Pricing Sheet),
Paragraph number 1,1, Page number 5, 33-35, Text of passage being questioned the scope’s reference to providing a CRM “system,” and the pricing structure organized around “CRM Platform License” and

“User Licenses.”,

Question: Is the University open to a custom-built solution, purpose-built for Delaware State University and owned by the University, priced without one-time build fees or recurring per-user license costs — rather than a commercially licensed CRM platform?

Response: Yes, the university is open to seeing a custom-built solution.

Section number Attachment 6 (Bid/Pricing Sheet, Paragraph number Entire Pricing Sheet, Page number 33-35, Text of passage being questioned pricing structured around “CRM Platform License” and “User Licenses.”,

Question: Will the University accept a pricing response that replaces platform and per-user license fees with design, build, and ownership-transfer costs, provided all costs are itemized in the grand total?

Response: Yes, provided the vendor provides an itemized cost.

Question 5: Wednesday 7/ 22/2026 3:52 pm

1. Statement of Work, Section number 3, Paragraph number 1, Page number 44, Text of passage being questioned “The Contractor shall provide all labor, software, implementation services, training, and support required to deliver a fully functional enterprise CRM system as described below.”,

Question: What CRM, if any, is being replaced?

Response: Due to current university procurement policy and procedures, we are not at liberty to disclose the current CRM vendor.

2. Statement of Work, Section number 3, Paragraph number 1, Page number 44, Text of passage being questioned “The Contractor shall provide all labor, software, implementation services, training, and support required to deliver a fully functional enterprise CRM system as described below.”,

Question: Can you provide details on the number of staff members that will require access to the system and what their roles will be (e.g. system administrators, other full access users, limited functionality such as application reviewers, etc.)?

Response: A minimum of 30 licenses would be required. System administrators (5), full access users (15), limited functionality such as application reviewers (10)

3. Statement of Work, Section number 3.2, Paragraph number 1, Page number 45, Text of passage being questioned “The CRM system shall provide, at minimum: Centralized management of prospects, inquiries, applicants, and admitted students.”,

Question: Can you provide estimates of the annual number of inquiries that are received, the annual number of applications that are started, and the annual number of applications that are received?

Response: Undergraduate-50k prospects, 15k inquiries, 20k applications, 8.5k-10k, admits, 2k-4k 10k enrollment. Graduate-25k prospects, 15k inquiries, 2k-7k applications, 3k-5k admits

4. Statement of Work, Section number 3.2, Paragraph number 1, Page number 45, Text of passage being questioned “The CRM system shall provide, at minimum: Centralized management of prospects, inquiries, applicants, and admitted students.”,

Question: Is the expectation that this CRM will replace the current application process?

Response: The CRM will manage prospects from a geographical aspect, but the university will still use external application platforms.

5. Statement of Work, Section number 3.2, Paragraph number 1, Page number 45, Text of passage being questioned “The CRM system shall provide, at minimum: Centralized management of prospects, inquiries, applicants, and admitted students.”,

Question: Will any applications be received from sources outside of the new CRM, such as the Common App or other sources?

Response: Yes, the university will still use external application platforms.

6. Statement of Work, Section number 4, Paragraph number 1, Page number 46, Text of passage being questioned “SECTION 4. SYSTEM INTEGRATION REQUIREMENTS”,

Question: Are there any additional integrations that may be required (e.g SSO, payment gateway, etc.)?

Response: Yes.

7. Statement of Work, Section number 4.1, Paragraph number 1, Page number 46, Text of passage being questioned “The Contractor shall provide bi-directional integration with the University’s Student Information System (SIS), enabling”,

Question: What Student Information System (SIS) is currently in use?

Response: The University uses Ellucian Banner System.

8. Statement of Work, Section number 4.2, Paragraph number 1, Page number 46, Text of passage being questioned “The CRM shall integrate with the University’s Learning Management System (LMS) to support:”,

Question: What Learning Management System (LMS) is currently in use?

Response: The university currently uses Canvas as its LMS system.

9. Statement of Work, Section number 5, Paragraph number 1, Page number 46, Text of passage being questioned “The CRM system must support or integrate with omnichannel communications, including: Email campaigns and automated messaging. SMS/text messaging compliant with applicable

regulations.”,

Question: Does DSU currently have marketing, email and/or SMS systems that it would prefer to use, if so can you provide a list of those?

Response: Yes, the university will still use external application platforms.

10. Statement of Work, Section number 5, Paragraph number 1, Page number 46, Text of passage being questioned “The CRM system must support or integrate with omnichannel communications, including: Email campaigns and automated messaging. SMS/text messaging compliant with applicable regulations.”,

Question: Can you provide estimates of the annual communication volumes for: Email sends, SMS sends?

Response: **Monthly-** 10-15 marketing emails, 4-8 transactional emails, 10-15 SMS messages. **Annual-** 120-180 marketing emails, 48-96 transactional emails, 120-180 SMS messages.

11. Statement of Work, Section number 5, Paragraph number 1, Page number 46, Text of passage being questioned “The CRM system must support or integrate with omnichannel communications, including: Email campaigns and automated messaging. SMS/text messaging compliant with applicable regulations.”,

Question: Approximately how many unique email addresses (contacts) do you include in email campaigns annually?

Response: upward of 25,000

12. Statement of Work, Section number 5, Paragraph number 1, Page number 46, Text of passage being questioned “The CRM system must support or integrate with omnichannel communications, including: Email campaigns and automated messaging. SMS/text messaging compliant with applicable regulations.”,

Question: On average, how many active contacts would you estimate that you have each month? These would be individuals that you would expect to receive at least one email or one SMS message during the month.

Response: upward of 50,000

Question 6: Thursday 7/23/2026

Question 1

Section number: Appendix A, Section 4

Paragraph number: 4.1

Page number: 46

Text of passage being questioned: "The Contractor shall provide bi-directional integration with the University's Student Information System (SIS), enabling: Synchronization of student biographic, academic, and enrollment data."

Question: Please identify the University's current Student Information System, including product name, version, and hosting model (on-premise or cloud), and any existing integration middleware or API layer the Contractor would be expected to use.

Response: Ellucian Banner 9 on Premises is the current SIS. It has its own API layer using Ellucian Ethos.

Question 2

Section number: Appendix A, Section 4

Paragraph number: 4.2

Page number: 46

Text of passage being questioned: "The CRM shall integrate with the University's Learning Management System (LMS) to support: Pre-matriculation engagement activities such as orientation or onboarding modules."

Question: Please identify the University's current Learning Management System and confirm whether LTI or API-based integration is preferred.

Response: Canvas is the LMS. Although not set up with API is in place, that is probably the preferred method going forward.

Question 3

Section number: Appendix A, Section 8

Paragraph number: 8.1

Page number: 47

Text of passage being questioned: "Data migration support, where applicable."

Question: Please describe the systems from which data would be migrated, including any incumbent CRM, the approximate number of records, and the historical depth of data the University expects to migrate.

Response: DSU would bring in applications, events, communication, and case management, with applications upward of 25,000 for the FY27/28 academic year from the current CRM legacy system.

Question 4

Section number: Appendix A, Section 3

Paragraph number: 3.1

Page number: 45

Text of passage being questioned: "The proposed CRM solution must support end-to-end lifecycle management for multiple student populations, including undergraduate, graduate, transfer, online, international, adult, and dual enrollment students."

Question: To size licensing and implementation accurately, please provide the approximate annual volume of inquiries, applicants, and admitted students, and the number of staff users expected to use the CRM across admissions, recruitment, and student service functions.

Response: Undergraduate-50k prospects, 15k inquiries, 20k applications, 8.5k-10k, admits. Graduate-25k prospects, 15k inquiries, 2k-7k applications, 3k-5k admits. A minimum of 30 licenses would be required. System administrators (5), Recruitment (15), and student service functions (10)

Question 5

Section number: Attachment 1, Non-Collusion Statement

Paragraph number: Signature block

Page number: 28

Text of passage being questioned: "THIS PAGE SHALL HAVE ORIGINAL SIGNATURE, BE NOTARIZED, AND RETURNED WITH YOUR PROPOSAL."

Question: Given that responses are received electronically as a single PDF file, please confirm that a scanned copy of the signed and notarized original included within the PDF satisfies this requirement, and whether the paper original must also be delivered by mail.

Response: Scanned copies in the PDF format will meet the initial requirements of vendor responses. There is no need to submit paper copies with response.

Question 6

Section number: Attachment 7, Section B

Paragraph number: 1

Page number: 40

Text of passage being questioned: "If audited statements are unavailable, reviewed or compiled statements may be accepted at the University's discretion."

Question: For a privately held vendor that does not undergo annual audits, please confirm whether

internally prepared financial statements accompanied by a banking reference are acceptable to demonstrate financial responsibility.

Response: Privately held vendors that do not undergo annual independent audits may submit internally prepared financial statements, a banking reference, and other available documentation demonstrating financial responsibility. Such documentation will be subject to University review, and DSU reserves the right to request additional financial information or clarification if necessary.

Question 7

Section number: Appendix B, Section D

Paragraph number: 3

Page number: 51

Text of passage being questioned: "Notwithstanding any other provision of this contract, there shall be no monetary limitation of vendor's liability for the vendor's breach of its obligations under this contract which proximately causes a (1) Covered Data Loss or (2) Covered Disclosure."

Question: Please confirm whether the University will consider negotiated exceptions to Appendix B terms submitted on Attachment 2, or whether all Appendix B provisions are mandatory for award.

Response: Vendors may identify proposed exceptions or requested modifications to Appendix B terms using Attachment 2, in accordance with the RFP instructions. Submission of an exception does not constitute acceptance by the University and does not guarantee that the requested modification will be approved.

All proposed exceptions will be reviewed by the University as part of the procurement and contracting process. DSU reserves the right to accept, reject, or negotiate proposed exceptions as permitted by applicable University and State procurement requirements. Final contractual terms will be reflected in the executed agreement.

Questions 7: Friday 7/24/2026

1.

Section number: Appendix A (Scope of Work), Section 1 (Introduction and Background) and Section 3.1 (CRM Functional Requirements)

Paragraph number: Section 1, first paragraph; Section 3.1, first paragraph

Page number: 44 to 45

Text of passage being questioned: "support admissions, recruitment, enrollment management, and student-facing customer service operations (Section 1); and the proposed CRM solution must support end-to-end lifecycle management for multiple student populations (Section 3.1)"

Question: Is the required functional scope limited to admissions, recruitment, enrollment management, and admissions-related student service, or does it also include post-enrollment functions such as retention, advising, student success, or alumni engagement?

Response: The initial implementation is primarily focused on admissions, recruitment, enrollment management, enrollment communications, and related student-service functions. The solution should be scalable to support future expansion into retention, advising, student success, alumni engagement, and other lifecycle functions. Post-enrollment capabilities not specifically identified as required RFP

deliverables should not be assumed to be part of the initial implementation.

2.

Section number: Appendix A (Scope of Work), Section 3.1 (CRM Functional Requirements)

Paragraph number: First paragraph

Page number: 45

Text of passage being questioned: “The proposed CRM solution must support end-to-end lifecycle management for multiple student populations, including undergraduate, graduate, transfer, online, international, adult, and dual enrollment students”

Question: Must all seven listed student populations be configured and deployed at initial go-live, or will they be implemented in phases? If phased, what is the University's priority order and target timeline for each population?

Response: DSU will consider a phased implementation and does not require all seven student populations to be deployed simultaneously at initial go-live. The first phase should prioritize populations most critical to active admissions and recruitment operations. Vendors should recommend an appropriate population sequencing and timeline based on business priority, complexity, dependencies, and operational readiness. Final phasing and target dates will be established during implementation planning.

3.

Section number: Appendix A (Scope of Work), Section 3.4 (Student Service and Case Management)

Paragraph number: First bullet

Page number: 45

Text of passage being questioned: “Centralized inquiry and case management for admissions and enrollment services”

Question: Which specific offices or functional areas must be supported for case management at go-live (for example Admissions, Financial Aid, Registrar, Bursar, or Advising), and approximately how many service staff will use case management in each area?

Response: Initial case management should prioritize Admissions and core Enrollment Management functions, with the capability to expand to Financial Aid, Registrar/Records, Student Accounts/Bursar, Advising/Student Success, and other student-service areas. Final go-live offices and staff counts by area have not been established. Vendors should provide a scalable case-management approach and clearly identify licensing assumptions and costs for future expansion.

4.

Section number: Appendix A (Scope of Work), Section 3.4 (Student Service and Case Management)

Paragraph number: Fourth bullet

Page number: 45

Text of passage being questioned: “Support for self-service and knowledge base integration, where applicable”

Question: Does the University require a student-facing self-service portal and knowledge base to be delivered as part of this solution, or is integration with an existing portal or knowledge base expected? If an existing system is to be used, which product is it?

Response: DSU expects the solution to support a student-facing self-service experience for prospective, applicant, admitted, and other applicable student populations. Self-service and knowledge-base capabilities may be provided natively within the CRM or through appropriate integration. DSU has not mandated a specific existing portal or knowledge-base product for retention. Vendors should describe their proposed approach and clearly identify any additional licensing, integrations, or costs.

5.

Section number: Appendix A (Scope of Work), Section 4.1 (Student Information System (SIS) Integration)

Paragraph number: Opening sentence

Page number: 46

Text of passage being questioned: “The Contractor shall provide bi-directional integration with the University's Student Information System (SIS)”

Question: Which Student Information System does the University use, including product name, version, and hosting model (on-premise or cloud), and what integration methods are available (for example REST or SOAP APIs, Ellucian Ethos, ODBC, or SFTP file exchange)?

Response: DSU currently utilizes Ellucian Banner 9 as its SIS and authoritative system of record. The specific hosting model and available integration methods will be confirmed during technical discovery with DSU IT. Vendors should support appropriate Banner integration methods, including applicable APIs, Ellucian Ethos, secure file exchange, or other approved methods, and clearly identify any middleware, licensing, connectors, or technical dependencies required.

6.

Section number: Appendix A (Scope of Work), Section 4.1 (Student Information System (SIS) Integration)

Paragraph number: Third bullet

Page number: 46

Text of passage being questioned: “Real-time or near real-time data transfer using secure methods”

Question: What data synchronization latency does the University expect between the CRM and the SIS (event-based real time versus scheduled batch), approximately what daily record volume is exchanged, and are the specific data objects and fields to be synchronized already defined?

Response: DSU prefers real-time or near-real-time synchronization for time-sensitive SIS transactions, with scheduled/batch processing acceptable where appropriate. Final daily record volumes and field-level specifications have not been established. Vendors should support relevant applicant, admissions, student, enrollment, program, term, and status data exchanges. Final objects, fields, system-of-record ownership, synchronization frequency, and reconciliation requirements will be established during technical discovery.

7.

Section number: Appendix A (Scope of Work), Section 4.2 (Learning Management System (LMS) Integration)

Paragraph number: Opening sentence and third bullet

Page number: 46

Text of passage being questioned: “The CRM shall integrate with the University's Learning Management System (LMS) ... Early alerts related to engagement during onboarding”

Question: Which Learning Management System does the University use, including product name and version, and which specific LMS engagement indicators should trigger CRM communications or early alerts?

Response: DSU currently utilizes Canvas as its LMS; specific version and technical configuration will be confirmed during discovery. The CRM should support configurable use of relevant LMS engagement data, such as participation, inactivity, milestone/assignment completion, and course completion status, to initiate communications, alerts, tasks, cases, or staff follow-up where appropriate. Final indicators, thresholds, and actions will be established during implementation.

8.

Section number: Appendix A (Scope of Work), Section 8.1 (Implementation Services); and Attachment 6 (Bid/Pricing Sheet, Implementation and Configuration)

Paragraph number: Section 8.1, fourth bullet; Attachment 6, Data Migration line item

Page number: 47 (and 33)

Text of passage being questioned: “Data migration support, where applicable”

Question: Is there an incumbent or legacy system from which data must be migrated into the new CRM? If so, please identify the product, the approximate number of records, the number of years of history to be migrated, and the current data format and condition.

Response: Vendors should propose a solution and approach that satisfies the RFP requirements.

Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation. DSU anticipates migration from its existing admissions/enrollment CRM and other applicable enrollment systems. Final source systems and record counts have not been established. Vendors should anticipate approximately 5–7 years of relevant historical data, where available, with data formats and quality varying by source. Vendors should include appropriate profiling, mapping, cleansing, deduplication, migration, and validation services and clearly identify all assumptions, limitations, and associated costs.

9.

Section number: Appendix A (Scope of Work), Section 4.1 (Student Information System (SIS) Integration)

Paragraph number: Third bullet

Page number: 46

Text of passage being questioned: “Real-time or near real-time data transfer using secure methods”

Question: Does the University operate an enterprise integration or middleware platform (for example Ellucian Ethos, MuleSoft, Boomi, or Microsoft Azure) that the CRM is expected to use for integrations, or is point-to-point integration built by the vendor expected?

Response: DSU does not currently utilize a single enterprise integration platform. Ellucian Ethos is available for Banner, and the University is open to vendor recommendations for additional integration solutions.

10.

Section number: Appendix A (Scope of Work), Section 4.3 (Reporting and Analytics)

Paragraph number: Second bullet

Page number: 46

Text of passage being questioned: “Export or integration with institutional reporting and business intelligence tools”

Question: Which institutional reporting or business intelligence tools must the CRM integrate with or export to (for example Microsoft Power BI, Tableau, Cognos, or a specific data warehouse)?

Response: DSU currently utilizes internal reporting systems. The University expects robust native CRM reporting and analytics capabilities with appropriate export and integration functionality. DSU has not mandated a specific BI or reporting platform for CRM integration through this clarification. The solution should provide robust native reporting capabilities and support integration/export to institutional BI tools and data environments through APIs, scheduled extracts, secure data feeds, or other appropriate methods. Vendors should identify any required connectors, middleware, licensing, or additional costs. Final BI and data-warehouse integration requirements will be confirmed during implementation.

11.

Section number: Attachment 6 (Bid/Pricing Sheet), Section 1 (Software Licensing and Subscription)

Paragraph number: User Licenses line item

Page number: 33

Text of passage being questioned: “User Licenses”

Question: How many users require access to the CRM, broken down by role (for example admissions counselors, enrollment staff, marketing users, service agents, administrators, and executive or read-only users), and does the University prefer named-user or concurrent-user licensing?

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation. DSU anticipates approximately 30 initial internal CRM users across admissions/recruitment, enrollment management, marketing, student services, administration, analytics, technical/integration, and executive roles. Exact counts by persona have not been finalized. DSU does not prescribe named-user or concurrent-user licensing; vendors should recommend the most appropriate and cost-effective model and clearly identify license types, limitations, and incremental costs for future growth.

12.

Section number: Appendix B (Cyber Responsibilities, Liability and Insurance), Section E (Cyber Liability Insurance); and Appendix A, Section 1

Paragraph number: Section E, item 2

Page number: 51

Text of passage being questioned: “the number of PII records anticipated to be housed within the solution”

Question: What is the anticipated total number of contact or PII records to be stored in the CRM, including active prospects, inquiries, applicants, admitted students, enrolled students, and historical records, and what annual growth should the vendor plan for?

Response: DSU has not established a final total contact/PII record count or annual growth percentage. Vendors should size the solution to support active prospects, inquiries, applicants, admitted and enrolled students, applicable historical records, and continued growth across recruitment cycles. Vendors should clearly identify record-volume assumptions, storage or licensing thresholds, archival options, growth capacity, and any associated incremental costs. Final volumes will be validated during discovery and data profiling.

13.

Section number: Appendix A (Scope of Work), Section 5 (Omnichannel Communication Requirements)

Paragraph number: First and second bullets

Page number: 46

Text of passage being questioned: “Email campaigns and automated messaging. SMS/text messaging compliant with applicable regulations”

Question: What are the University's expected annual email and SMS/text message volumes, and does the University want these capabilities delivered natively within the CRM or integrated with existing email and SMS providers? If existing providers are to be used, which are they?

Response: Final annual and peak email/SMS volumes have not been established. Vendors should clearly identify volume assumptions, included usage, overage rates, carrier fees, and other messaging costs. DSU is open to native CRM capabilities and/or integrated third-party messaging solutions and has not mandated an existing provider for retention. Vendors should recommend a scalable approach supporting automation, consent/preference management, deliverability, two-way messaging, and reporting.

14.

Section number: Appendix B (Cyber Responsibilities, Liability and Insurance), Section A (Vendor Protection of Customer Data)

Paragraph number: Item 1

Page number: 49

Text of passage being questioned: “The awarded vendor shall, at a minimum, comply with all Delaware Department of Technology and Information (DTI) security standards identified in this Request for Proposals and any resultant contract(s)”

Question: The referenced DTI security standards and the DTI Cloud and Offsite Hosting Policy are not included in the RFP. Where can vendors obtain the current versions of these standards so that compliance can be assessed and attested in the proposal?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement. DSU acknowledges that the referenced DTI security standards and Cloud and Offsite Hosting Policy were not included with the RFP. Applicable standards and policies, or instructions for accessing the governing versions, will be provided through the procurement process. Vendors will be expected to comply with the applicable DSU and State of Delaware/DTI requirements identified for this procurement.

15.

Section number: Appendix B (Cyber Responsibilities, Liability and Insurance), Section E (Cyber Liability Insurance)

Paragraph number: Items 1 and 2

Page number: 51

Text of passage being questioned: “present a valid certificate of cyber liability insurance at the levels indicated below”

Question: The coverage-level table referenced by the phrase at the levels indicated below does not appear in the document. What are the required cyber liability insurance coverage amounts, and what PII-record thresholds determine the applicable level?

Response: The University’s Procurement and/or Legal team will provide clarification regarding this contractual requirement. DSU acknowledges that the referenced coverage-level table was not included in the RFP. The applicable cyber liability insurance coverage amounts and any associated PII-record thresholds will be clarified through an addendum. Vendors should not assume specific thresholds or coverage levels that are not expressly stated in the RFP or subsequent addenda.

16.

Section number: Appendix B (Cyber Responsibilities, Liability and Insurance), Section E (Cyber Liability Insurance)

Paragraph number: Item 1

Page number: 51

Text of passage being questioned: “An awarded vendor unable to meet the DTI Cloud and Offsite Hosting Policy requirement of encrypting PII at rest shall, prior to execution of a contract, present a valid certificate of cyber liability insurance at the levels indicated below”

Question: For a vendor that encrypts all PII at rest, is the cyber liability insurance requirement in Section E waived, or is that insurance required regardless of encryption at rest?

Response: The University’s Procurement and/or Legal team will provide clarification regarding this contractual requirement. The cyber liability insurance requirement applies regardless of whether PII is encrypted at rest. Encryption does not waive or replace the insurance requirements stated in the RFP. Any requested exception or modification should be submitted through the RFP’s exceptions process and is subject to University review.

17.

Section number: Appendix A (Scope of Work), Section 7 (Security, Compliance, and Accessibility)

Paragraph number: Fifth bullet

Page number: 47

Text of passage being questioned: “Public-sector cybersecurity and risk management requirements”

Question: Does the University require that all Customer Data and PII be stored and processed within the United States? If so, is a specific U.S. region, single-tenant hosting, or FedRAMP authorization required?

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation. DSU expects Customer Data and PII to be hosted and processed within the United States and in accordance with applicable University and State security and privacy requirements. Vendors must disclose all data hosting, processing, backup, access, and subprocessor locations. DSU has not mandated a specific U.S. region, single-tenant hosting, or FedRAMP authorization. Final hosting and data-residency requirements will be subject to DSU IT and Information Security review.

18.

Section number: Appendix A (Scope of Work), Section 7 (Security, Compliance, and Accessibility)

Paragraph number: Fourth bullet

Page number: 47

Text of passage being questioned: “Accessibility standards at or above WCAG 2.1 AA”

Question: Must vendors submit a current VPAT or Accessibility Conformance Report with the proposal, and does the WCAG 2.1 AA requirement apply to the administrative user interface, the student-facing interface, or both?

Response: Vendors should provide a current VPAT/ACR or equivalent accessibility documentation with the proposal, where available, and disclose any known accessibility limitations. WCAG 2.1 AA applies to both administrative and student-facing interfaces, including applicable configured or custom experiences. Vendors should describe their accessibility testing and remediation practices.

19.

Section number: Appendix B (Cyber Responsibilities, Liability and Insurance), Section D (No Limitation of Liability for Certain Data Breaches)

Paragraph number: Item 3

Page number: 50

Text of passage being questioned: “there shall be no monetary limitation of vendor's liability for the vendor's breach of its obligations under this contract which proximately causes a (1) Covered Data Loss or (2) Covered Disclosure”

Question: Will the University consider a negotiated cap on data-breach liability, for example one tied to the vendor's cyber liability insurance limits, or is unlimited liability under Section D a firm, non-negotiable requirement?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement. The liability provisions in the RFP remain applicable. Vendors may submit proposed exceptions or modifications, including a proposed cap on data-breach liability, through the RFP's exceptions process. Any such request is subject to University Legal and Procurement review and does not guarantee acceptance. Final liability terms will be governed by the executed contract.

20.

Section number: Request for Proposal, front-matter submission instructions (ALL VENDORS); and Section IV.B (RFP Submissions), item 9 (Concise Proposals)

Paragraph number: The Aggregate size of your response paragraph; Section IV.B, item 9

Page number: 2 (and 9)

Text of passage being questioned: “Aggregate size of your response without compressing the file must not be more than 5 megabytes ... should be only one file instead of multiple files”

Question: Does the University impose a maximum page count for the proposal, and do the required forms and attachments (Attachments 1 through 7 and the W-9) count toward the 5 megabyte single-PDF size limit, or does that limit apply only to the vendor's narrative response?

Response: DSU has not established a maximum proposal page count unless otherwise stated in the RFP. The 5 MB single-PDF limit applies to the complete proposal submission, including the narrative response, required forms, Attachments 1 through 7, W-9, and other required submission materials. Vendors should ensure the final PDF is complete and legible.

21.

Section number: Request for Proposal, Section IV.A (RFP Issuance and administrative), item 23 (Business References); and Attachment 4 (Business References)

Paragraph number: Section IV.A, item 23

Page number: 12 (and 31)

Text of passage being questioned: “Provide at least three (3) business references consisting of current or previous customers of similar scope and value”

Question: For the three required business references, does similar scope and value require higher-education enrollment or CRM implementations specifically, or are references from any industry acceptable provided the contract scope and dollar value are comparable?

Response: References should reflect projects of comparable scope, complexity, and value. Higher-education enrollment or CRM implementation experience is preferred; however, comparable references from other industries are acceptable where they demonstrate relevant experience and capabilities.

Questions 8: Monday 7/27/2026

Questions presented: could you confirm whether an internationally based remote implementation team is

eligible to participate, provided it can satisfy the technical, security, support and contractual requirements?

Response: The RFP requires implementation and related project activities performed for DSU to be conducted within the United States. Therefore, an internationally based remote implementation team would not meet the requirement as currently stated. Vendors may submit an exception in accordance with the RFP; however, any exception is subject to University review and does not guarantee acceptance or waiver of the requirement.

If eligible, would it be useful if I sent a concise three-point approach tailored to the CRM architecture and rollout?

Response: Vendors may include their proposed CRM architecture and rollout approach in their response; however, this does not modify the U.S.-based implementation requirement. Any proposed exception must be submitted through the RFP's exceptions process and is subject to University review.

Questions 9: Thursday 7/30/2026

Section number: IV

Paragraph number: D.5.n (Vendor Activity)

Page number: 22

Text of passage being questioned: "No activity is to be executed in an offshore facility, either by a subcontracted firm or a foreign office or division of the vendor. The vendor must attest to the fact that no activity will take place outside of the United States in its transmittal letter. Failure to adhere to this requirement is cause for elimination from future consideration."

Question: Our organization's product development, implementation, and technical support functions are performed by teams based in Bengaluru, India, while account management, contracting, and U.S. client engagements are handled by U.S.-based staff, with all customer data hosted in the United States. Given the language in this provision, we would like to confirm whether this delivery model would disqualify us from bidding on this RFP, or whether the University would consider a proposal that discloses this delivery structure, potentially accompanied by an exception filed under Attachment 2. We would appreciate clarification on whether this is a strict, non-waivable requirement or one that may be addressed through the exceptions process before we proceed further with proposal preparation.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement. The U.S.-only requirement applies to implementation, development, technical support, and other project activities performed for DSU, including activities involving DSU systems or data. Accordingly, the offshore implementation and technical support model described would not meet the requirement as currently stated. Vendors may identify an exception in accordance with Attachment 2; however, submission of an exception does not guarantee acceptance or waiver and will be subject to University review.

Questions 10: Tuesday 8/4/2026

1. **Question:** Can enrollmentFUEL submit a response for the implementation of the Slate CRM?

Response: Yes. enrollmentFUEL may submit a proposal for implementation of Slate, provided the proposed solution and services meet all requirements of the RFP. All required licensing, implementation, integration, support, and associated costs should be clearly identified in the proposal.

2. **Question:** If not, do you see releasing another RFP of implementation of the Slate CRM?

Response: No separate RFP for Slate implementation is currently anticipated. Qualified vendors may propose Slate and associated implementation services in response to the current RFP, provided all requirements are met. Any future procurement will be determined based on the outcome of this solicitation and University needs.

3. **Question:** Do you know what the budget would be for the implementation portion of this work?

Response: DSU has not established a separate implementation budget for disclosure. Vendors should provide competitive, fully itemized pricing for all implementation services required to successfully deploy the proposed solution, with implementation costs clearly distinguished from software licensing, ongoing support, optional services, and third-party costs.

Questions 11: Tuesday 8/4/2026

1. Appendix A - Section 3.2, Page: 45, **QUESTION:** How many application types, programs, terms, checklist models, decision workflows, and exception processes must be supported, and which elements vary by population or academic program?

Response: DSU supports multiple application and enrollment pathways across undergraduate, graduate, transfer, online, international, adult, and dual enrollment populations. Application requirements, terms, checklists, decision workflows, communications, and exception processes may vary by population and program. Final counts and configurations will be established during discovery. Vendors should provide flexible, administrator-configurable functionality to support these variations.

2. I. Overview - Schedule of Events, Page: 4, **QUESTION:** Please provide the approved or anticipated budget range for the CRM software, implementation services, integrations, data migration, training, and ongoing support, and clarify whether the budget is intended to include Salesforce subscription licensing.

Response: DSU has not established a budget range or not-to-exceed amount for disclosure. Vendors should provide competitive, fully itemized pricing for the complete solution, including software licensing, implementation, integrations, data migration, training, and ongoing support. If Salesforce or another third-party platform is proposed, required subscription licensing should be included in the total proposed cost and clearly itemized.

3. IV.D.5.n Vendor Activity, Page: 22, **QUESTION:** Does the U.S.-only activity requirement apply solely to professional services performed by the prime vendor and its subcontractors, or also to Salesforce's global cloud operations, follow-the-sun support, affiliates, and subprocessors?

Response: Vendors should clearly disclose all proposed subcontractors and partner roles in accordance with the RFP. Final subcontracting requirements are subject to Procurement review.

4. IV.D.1.d; IV.D.5.s Contract Documents, Page: 16, 23, **QUESTION:** Will the University accept Salesforce's then-current cloud service terms, order form, acceptable-use policy, privacy terms, and service-level commitments for the Salesforce subscription, and how will conflicts between those terms and the University contract be resolved?

Response: DSU does not confirm acceptance of Salesforce or other third-party standard terms through this clarification. Vendors should identify all applicable publisher terms, order forms, privacy/data-processing terms, SLAs, and other third-party agreements associated with the proposed solution. Any conflicts with University requirements will be addressed during contract review and negotiation, with final precedence established in the executed contract documents.

5. Appendix A - Section 8.1, Page: 47, **QUESTION:** Please identify every source system and file repository to be migrated, the historical periods required, and whether migration includes prospects, applications, students, activities, communications, cases, campaign membership, documents, consent history, and audit data.

Response: Migration is expected to include relevant data from the existing CRM and other applicable enrollment systems, including prospects/inquiries, applications, enrollment records, activities, communications, cases, campaign participation, consent/preference history, and applicable documents/attachments. DSU anticipates approximately 5–7 years of relevant historical data, where available. Final source systems, repositories, historical periods, and audit/document migration requirements will be confirmed during discovery and data profiling. Vendors should identify all migration

assumptions, exclusions, limitations, and associated costs.

6. Appendix A - Section 8.1, Page: 47, **QUESTION:** Please provide estimated record and file volumes by source, file sizes and formats, data-extract capabilities, unique identifiers, and anticipated annual growth.

Response: Final record and file volumes by source have not been established. Vendors should anticipate migration of relevant prospect, applicant, enrollment, communication, event, campaign, consent, and related historical data, including applicable documents and attachments. Source-specific volumes, formats, extract methods, and unique identifiers will be validated during discovery and data profiling. Vendors should clearly identify migration/storage assumptions, volume limitations, and costs associated with anticipated growth.

7. Appendix A - Sections 4.1 and 8.1, Page: 46-47, **QUESTION:** Will the University own source-data cleansing, standardization, duplicate resolution, and remediation, or should the vendor include data profiling and cleansing services, and what quality thresholds must be met?

Response: DSU expects a shared approach to data quality. Vendors should include appropriate data profiling, mapping, standardization, cleansing, validation, and duplicate-resolution support as part of migration. DSU will provide source-system knowledge and approve business rules or remediation decisions requiring institutional judgment. Final data-quality thresholds and migration acceptance criteria will be established during implementation.

8. Appendix A - Section 3.2, Page: 45, **QUESTION:** Is the CRM expected to serve as the application system of record and host the application experience, or will it track applications submitted through an existing admissions application platform or SIS?

Response: The CRM should support end-to-end application and admissions lifecycle management but is not required to serve as the sole application system of record. Vendors may propose a CRM-hosted application experience and/or integration with applicable application platforms. Ellucian Banner 9 will remain the authoritative SIS. Vendors should clearly describe the proposed application architecture, integrations, and associated costs. Final architecture will be established during implementation.

9. Appendix A - Sections 8.1 and 9, Page: 47, **QUESTION:** Will the University approve a prioritized product backlog and formal requirements baseline before build, and will requirements added or materially changed after approval be managed through a written change-control process?

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

10. Appendix A - Section 4.1, Page: 46, **QUESTION:** Please identify the SIS product, version, hosting model, implementation partner, integration owner, and planned upgrades during the project and contract term.

Response: DSU currently utilizes Ellucian Banner 9 as its SIS and authoritative system of record. Specific hosting, implementation/support partner, integration ownership, and planned upgrade information will be confirmed during technical discovery with DSU IT. Vendors should support appropriate Banner integration methods, including applicable APIs/Ellucian Ethos capabilities, and clearly identify integration assumptions, prerequisites, licensing, and dependencies.

11. Appendix A - Sections 1, 4, and 5, Page: 44, 46, **QUESTION:** Please provide a complete inventory of additional systems in scope, including application platforms, identity management, ERP/finance, document management, financial aid, testing vendors, data warehouse/BI, telephony, email, SMS, event tools, social media, web CMS, scheduling, and payment systems.

Response: Known core systems include Ellucian Banner 9 (SIS) and Canvas (LMS), along with applicable application, identity, financial aid, document management, BI/reporting, telephony, email/SMS, event, social media, web/CMS, scheduling, and payment systems. A complete integration inventory has not been finalized. Vendors should provide a flexible integration approach and clearly identify assumptions, dependencies, licensing, and costs. Final systems, interfaces, and retain/replace/integrate decisions will be validated during discovery.

12. Appendix A - Section 4.1, Page: 46, **QUESTION:** Please provide the required data objects, fields, direction, system of record, create/update rules, matching keys, error handling, and source-to-target mapping for each SIS interface.

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

13. Appendix A - Section 5; Attachment 6, Page: 46, 33, **QUESTION:** What SMS provider, phone numbers, short codes or toll-free numbers, countries, annual and peak message volumes, opt-in sources, quiet hours, preference management, and two-way messaging use cases are required?

Response: DSU has not prescribed a specific SMS provider, short code, or toll-free number for the proposed solution. Vendors should support compliant one-way and two-way SMS and identify all required messaging infrastructure, carrier-registration requirements, and associated costs. The solution should support consent/opt-in/opt-out, preference management, quiet hours, suppression, and communication history. Primary use cases include recruitment, application completion, events, admitted-student engagement, enrollment reminders, and student inquiries. Final volumes and messaging configurations will be established during implementation.

14. Appendix A - Section 5; Attachment 6, Page: 46, 33, **QUESTION:** What email platforms are currently used, must they be retained or replaced, what are the annual and peak send volumes, and are dedicated IPs, sender-domain authentication, preference centers, journey orchestration, and deliverability services required?

Response: The proposed CRM should provide or integrate robust omnichannel enrollment communications. Vendors should identify native capabilities and any required third-party services.

15. Appendix A - Sections 1-3, Page: 44-45, **QUESTION:** Does the University currently own or use Salesforce, Education Cloud, Sales Cloud, Service Cloud, Marketing Cloud, Data Cloud, Experience Cloud, MuleSoft, or related products, and if so, please provide editions, license quantities, renewal dates, and current utilization.

Response: Vendors proposing Salesforce should identify all required products, editions, license quantities, dependencies, and associated costs. Any applicable existing University technology or licensing assets will be confirmed during implementation planning.

16. Appendix A - Section 9, Page: 47, **QUESTION:** Is the University expecting a new Salesforce

production org, configuration within an existing org, or consolidation of multiple existing CRM environments, and are there enterprise architecture standards that govern org strategy?

Response: Vendors proposing Salesforce should recommend the appropriate org and environment strategy and clearly identify associated licensing, dependencies, and costs. Final architecture and environment decisions will be reviewed with DSU IT and Information Security during implementation.

17. V.2 Evaluation Criteria; Attachment 6, Page: 14, 34, **QUESTION:** Please clarify whether predictive enrollment modeling and AI capabilities are mandatory for the base implementation and scoring, or should they be proposed as optional value-added services, and what specific predictions or decisions are expected?

Response: Predictive analytics and enrollment modeling are desired capabilities; however, advanced AI functionality may be proposed as optional/value-added services unless otherwise required by the RFP. Vendors should clearly identify capabilities included in the base solution versus optional offerings. Priority use cases may include lead scoring, likelihood to apply/enroll, melt-risk identification, next-best action, engagement prioritization, and enrollment forecasting. Final use cases will be established during implementation.

I recommend the **shorter version** because it keeps advanced AI from unnecessarily increasing the mandatory baseline cost while still requiring vendors to demonstrate how their platform can support DSU's future predictive enrollment strategy.

18. Appendix A - Section 7, Page: 47, **QUESTION:** Are there required data-residency, data-processing-location, government-cloud, StateRAMP, FedRAMP, or U.S.-person support requirements beyond the U.S.-only professional-services clause?

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation. DSU requires compliance with the U.S.-based service requirements in the RFP and applicable University and State security requirements. Final data-residency and processing requirements will be subject to DSU IT and Information Security review.

19. Appendix A - Section 7; Appendix B - Section E, Page: 47, 51, **QUESTION:** Please define the required encryption standard and confirm whether Salesforce standard platform encryption satisfies the at-rest requirement or whether Salesforce Shield Platform Encryption, customer-managed keys, or field-level encryption is mandatory.

Response: The solution must provide industry-standard encryption for data at rest and in transit and comply with applicable DSU and State security requirements. DSU has not specifically mandated Salesforce Shield, customer-managed keys, or field-level encryption. Vendors should identify included encryption capabilities and any additional licensing required. Final encryption and key-management requirements will be determined through DSU IT and Information Security review.

20. Appendix A - Section 7; Appendix B - Section A, Page: 47, 49, **QUESTION:** Please provide the complete DTI security standards, cloud and offsite hosting policy, security questionnaire, required contractual addenda, and assessment process that will apply to the proposed

Salesforce solution and implementation partner.

Response: The selected vendor and solution must comply with applicable DSU and State of Delaware/DTI security, privacy, cloud/offsite hosting, and data-protection requirements. Applicable security standards, questionnaires, contractual addenda, and assessment requirements will be coordinated through DSU IT, Information Security, Procurement, and appropriate State stakeholders. Vendors should provide available security documentation and identify any exceptions or dependencies. The proposed solution and implementation partner will be subject to required security review prior to production deployment.

21. Appendix A - Section 8, Page: 47, **QUESTION:** What is the University's target production go-live date, academic term or recruitment cycle that drives the deadline, and any blackout periods during admissions, registration, financial aid, or enrollment operations?

Response: DSU anticipates a target production go-live of March 1, 2027, to support upcoming recruitment and enrollment cycles. Formal blackout periods have not been established; however, vendors should account for critical admissions, registration, financial aid, and enrollment periods when developing the implementation schedule. Specific calendar constraints and blackout periods will be confirmed during project initiation.

22. Appendix A - Sections 3 and 8, Page: 44-47, **QUESTION:** Will the University consider a phased implementation by student population, business capability, or integration, and which capabilities and populations are required for the first production release?

Response: DSU will consider a phased implementation by population, capability, and/or integration. The first production release should prioritize core admissions and recruitment functionality, including prospect/inquiry management, application and admitted-student engagement, communications, events, reporting, and required SIS integrations. Vendors should recommend an appropriate phasing strategy, with final first-release scope and sequencing established during implementation planning.

23. Attachment 6 - Pricing Sheet, Page: 33, **QUESTION:** Should Salesforce software subscriptions be included in the prime vendor's proposal and invoiced through the prime vendor, or may the University procure Salesforce licenses separately through Salesforce, Carahsoft, or another authorized reseller?

Response: Vendors should clearly identify all required software subscriptions, licensing, pass-through costs, and procurement dependencies in their proposal.

24. Appendix B - Section D; Appendix A - Section 10, Page: 51, 48, **QUESTION:** What required recovery time objective, recovery point objective, uptime percentage, maintenance-window policy, backup frequency, restore-testing standard, and business continuity obligations apply to the CRM and integrations?

Response: Vendors should provide their proposed uptime SLA, RTO/RPO, backup and retention practices, maintenance-window policies, restore-testing procedures, and disaster-recovery/business-continuity commitments for the CRM and vendor-managed integrations. Planned maintenance should minimize operational disruption and be communicated in advance. Final availability, recovery, and continuity requirements will be established with DSU IT and Information Security and reflected in the final contract.

25. Appendix B; Appendix A - Section 10, Page: 49-52, 48, **QUESTION:** Please clarify the division of responsibility among Delaware State University, JourneyBlazers, Salesforce, and other

providers for platform availability, product defects, backups, disaster recovery, security incidents, data breaches, and support escalation.

Response: DSU has not selected Salesforce, JourneyBlazers, or any other provider. Vendors should clearly define responsibilities among DSU, the proposed software provider, implementation partner, and third parties for platform availability, product defects, backups/disaster recovery, security incidents, data breaches, integrations, and support escalation. Generally, each party will be responsible for systems and services within its control, with coordinated incident management and escalation required across providers. Final responsibilities and service levels will be established in the applicable contracts.

26. Attachment 6 - User Licenses; Appendix A - Sections 3-5, Page: 33, 44-46, **QUESTION:** Please provide anticipated named-user counts by persona, including admissions counselors, managers, marketing staff, service agents, administrators, integration users, executives, analysts, and read-only users, with expected growth by year.

Response: DSU anticipates approximately 30 initial named internal CRM users across admissions/recruitment, enrollment management, marketing, student services, administration, analytics, technical/integration, and executive roles. Exact counts by persona and annual growth have not been finalized. Vendors should provide scalable licensing options and clearly identify user tiers, limitations, and incremental costs for future growth.

27. Appendix A - Sections 3-4, Page: 45-46, **QUESTION:** Please provide current and projected volumes for prospects, applications, students, activities, cases, communications, files, and integration transactions, including annual growth and data-retention expectations.

Response: Vendors should use the volume estimates provided in this Addendum and design for reasonable annual growth. Final transaction, storage, and retention assumptions will be validated during implementation.

28. IV.D.5.z Volumes and Quantities, Page: 24, **QUESTION:** Will increases in user counts, data volumes, message volumes, integrations, business units, or transaction volumes beyond stated proposal assumptions be handled through license adjustments and formal change control?

Response: DSU anticipates a minimum of 30 internal users: approximately 5 system administrators, 15 full-access/recruitment users, and 10 limited-access or student-service users. Growth should be accommodated over the contract term.

29. Appendix A - Section 7, Page: 47, **QUESTION:** What audit events, fields, users, retention periods, monitoring, alerting, export, and investigation capabilities are required, and are Salesforce Shield Event Monitoring and Field Audit Trail mandatory?

Response: The solution should provide audit logging for user/access activity, configuration changes, critical data changes, integrations, and other significant system events, with appropriate search, monitoring, alerting, investigation, and export capabilities. Salesforce Shield Event Monitoring and Field Audit Trail are not specifically mandated; vendors should recommend appropriate audit capabilities and identify any additional licensing or costs. Final audit scope and retention requirements will be established with DSU IT and Information Security during implementation.

30. Appendix A - Section 10, Page: 48, **QUESTION:** Please define required support hours, severity levels, response and resolution targets, escalation contacts, holiday coverage, after-hours support, and whether 24x7 support is required for critical incidents.

Response: Vendors should provide their standard enterprise SLA, including uptime, support hours, severity levels, response/resolution targets, escalation procedures, maintenance practices, and disaster-recovery commitments for evaluation by the University.

31. Appendix A - Section 9; IV.D.5.i, Page: 47, 21, **QUESTION:** Please define the deliverable acceptance process, review period, approvers, required documentation standards, and objective completion criteria for configuration, integrations, migration, testing, training, and go-live.

Response: Deliverable acceptance will be based on approved requirements, defined completion criteria, applicable testing/UAT results, and required documentation. Appropriate DSU functional and/or technical representatives will review and approve deliverables based on the nature of the work. Vendors should propose a structured review, remediation, and acceptance process. Final review periods, approvers, documentation standards, and acceptance criteria will be established during project initiation and reflected in the implementation plan and contract.

32. Appendix A - Section 3.3, Page: 45, **QUESTION:** Please provide the University's standard funnel stages, stage-entry and exit definitions, source systems, and the number of population, program, and term variants that must be configured.

Response: DSU's standard funnel generally includes prospect/inquiry, application started, application completed, admitted, deposited/committed, and enrolled. Stage definitions should be configurable based on student actions, application status, and enrollment milestones. The solution should support variations by population, program, and term. Final stage definitions, source mappings, and number of variants will be established during implementation.

33. Appendix A - Section 8.1, Page: 47, **QUESTION:** How many migration rehearsals, validation cycles, mock cutovers, and final conversion windows are expected, and what are the University's reconciliation and sign-off requirements?

Response: Vendors should propose an appropriate migration testing, rehearsal, reconciliation, and cutover approach. Final cycles and sign-off requirements will be established during implementation.

34. Appendix A - Section 3.4, Page: 45, **QUESTION:** Which departments and service teams are in scope for case management at go-live, and what case types, queues, channels, service-level targets, escalation paths, and knowledge domains are required?

Response: Initial use will focus on admissions and enrollment-related student services, with the ability to expand. Specific case types, queues, channels, escalation rules, service levels, and operating hours will be established during implementation.

35. IV.D.5.z Status Reporting; Appendix A - Section 8, Page: 24, 47, **QUESTION:** What constitutes final system acceptance, and is acceptance expected after initial go-live, completion of hypercare, resolution of specified defects, or completion of all multi-year roadmap items?

Response: Final acceptance will be based on completion of the agreed implementation scope, successful testing/UAT and production deployment, completion of stabilization/hypercare, and resolution or agreed disposition of critical/high-priority defects. Acceptance will not be contingent upon completion of optional enhancements or future multi-year roadmap items unless specifically included as required deliverables. Final acceptance criteria will be established in the implementation plan and contract.

36. Appendix A - Section 4.1, Page: 46, **QUESTION:** Please define the required latency for each SIS

data flow, including which transactions must be synchronous or event-driven and which may be scheduled or batch-based.

Response: Time-sensitive enrollment transactions should support real-time or near-real-time processing where feasible; other integrations may use scheduled or batch processing. Detailed requirements will be finalized during technical discovery.

37. Appendix A - Section 4.2, Page: 46, **QUESTION:** Please identify the LMS product, version, hosting model, authentication method, available APIs or event services, integration owner, and any planned LMS changes during the project.

Response: DSU currently utilizes Canvas as its LMS. The proposed CRM should support integration through available APIs and/or other appropriate integration methods. Specific version, hosting, authentication, API/event-service capabilities, integration ownership, and technical requirements will be confirmed during discovery with DSU IT and appropriate stakeholders. Vendors should clearly identify any LMS integration assumptions or prerequisites

38. Appendix A - Section 4.1, Page: 46, **QUESTION:** Please provide expected daily and peak transaction volumes, batch sizes, API-rate limits, concurrency constraints, maintenance windows, and historical peak periods for SIS integrations.

Response: Time-sensitive enrollment transactions should support real-time or near-real-time processing where feasible; other integrations may use scheduled or batch processing. Detailed requirements will be finalized during technical discovery.

39. Appendix A - Sections 1-3, Page: 44-45, **QUESTION:** Please identify all schools, campuses, colleges, departments, brands, and operating units that will use the CRM and whether they require shared or separate processes, data visibility, branding, communication domains, and reporting.

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

40. Appendix A - Section 11, Page: 48, **QUESTION:** Please provide formal definitions, current baselines, target outcomes, data owners, calculation rules, and reporting frequency for each required performance measure.

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

41. Appendix A - Section 7, Page: 47, **QUESTION:** What security review artifacts are required from the vendor and Salesforce, including SOC reports, ISO certifications, penetration-test summaries, vulnerability scans, architecture diagrams, data-flow diagrams, business continuity plans, and remediation commitments?

Response: Specific technical requirements will be finalized with the awarded vendor in consultation with University IT and Information Security and must comply with applicable University and State standards.

42. Appendix A - Sections 3.4 and 7, Page: 45, 47, **QUESTION:** What identity provider, SSO protocol, MFA policy, user-provisioning method, and account lifecycle requirements apply to

internal staff and any external users?

Response: The CRM must support secure SSO, MFA, role-based access, and appropriate user provisioning/deprovisioning for internal users, as well as secure authentication and account lifecycle management for applicable external users. Vendors should describe supported identity standards, protocols, and automated provisioning capabilities. Final identity provider, SSO/MFA, provisioning, and account lifecycle requirements will be confirmed with DSU IT and Information Security during implementation.

43. Appendix A - Section 8.1, Page: 47, **QUESTION:** What UAT duration, number of testers, business areas, test cycles, test-management tools, and daily support coverage does the University expect, and who will author and execute business test cases?

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

44. Appendix A - Sections 8.1 and 9, Page: 47, **QUESTION:** What defect severity definitions, exit criteria, allowable open defects, performance thresholds, security sign-offs, and go/no-go approvals will determine readiness for production?

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

45. Appendix A - Section 8.2, Page: 47, **QUESTION:** What change-management activities are expected from the vendor beyond training, such as stakeholder analysis, communications, readiness assessments, adoption campaigns, champion networks, office hours, and post-go-live adoption measurement?

Response: Vendors should include an appropriate change-management approach beyond training, which may include stakeholder/readiness assessments, communication planning, adoption strategies, champion development, office hours, and post-go-live adoption measurement. Vendors should identify proposed activities, deliverables, DSU resource requirements, and associated costs. Final change-management priorities will be established during implementation planning.

46. Appendix A - Sections 3.2 and 3.4, Page: 45, **QUESTION:** Does the scope include a new applicant or prospect portal, authenticated status pages, document upload, checklist completion, appointment scheduling, knowledge search, and case submission, or should the CRM integrate with existing digital experiences?

Response: Student-facing self-service capabilities are desired. Vendors should describe available portal, status, document, scheduling, knowledge, and case-submission functionality and integration options.

47. Appendix A - Section 4, Page: 46, **QUESTION:** Does the University have an enterprise integration platform or middleware standard, such as MuleSoft, Boomi, Informatica, Ellucian Ethos, Azure Integration Services, or another iPaaS, and must the selected vendor use it?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

48. Appendix A - Section 5, Page: 46, **QUESTION:** Does the scope require telephony or contact-

center integration, screen pops, click-to-dial, call recording, transcription, disposition codes, routing, or only manual activity logging, and what telephony platform is currently used?

Response: DSU is interested in both manual call activity logging and integrated telephony/contact-center capabilities where available. Vendors should describe supported options and dependencies.

49. Appendix A - Sections 3.3, 5, and 6, Page: 45-47, **QUESTION:** How many initial campaigns, journeys, audience segments, decision splits, behavioral triggers, and recurring communications must be configured, and which use cases are highest priority for go-live?

Response: DSU has not established final counts for campaigns, journeys, segments, decision splits, or behavioral triggers. Vendors should include sufficient configuration to support priority go-live journeys, including prospect/inquiry nurturing, application completion, admitted-student engagement, deposit/commitment, enrollment/melt prevention, and event communications. Final campaign inventory, complexity, and priorities will be established during discovery.

50. Appendix A - Sections 4.3, 9, and 11, Page: 46-48, **QUESTION:** Please provide the number and priority of dashboards, reports, data extracts, and scheduled distributions required by user persona, including any pixel-perfect, regulatory, or board reporting needs.

Response: DSU has not established final counts for dashboards, reports, extracts, or scheduled distributions. The solution should support configurable role-based dashboards, ad hoc and scheduled reporting, data extracts, automated distribution, and executive-level reporting. Priority areas include funnel performance, applications, conversion/yield, recruitment activity, communications, events, case management, and enrollment trends. Final reporting inventory, priorities, and any specialized regulatory or board-reporting requirements will be established during implementation.

51. Appendix A - Section 4.3, Page: 46, **QUESTION:** What reporting, data warehouse, and business intelligence platforms are currently used, and should Salesforce be the primary analytics layer or provide data to an existing enterprise reporting environment?

Response: DSU currently utilizes internal reporting systems. The University expects robust native CRM reporting and analytics capabilities with appropriate export and integration functionality.

52. Appendix A - Section 8.2; Attachment 6, Page: 47, 34, **QUESTION:** Please provide the number of learners by role, training modalities, locations, session counts, class sizes, recording requirements, accessibility standards, and whether the University expects train-the-trainer or direct end-user training.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

53. Appendix A - Sections 3.2, 3.3, and 6, Page: 45-47, **QUESTION:** Please estimate the number of workflows, routing rules, alerts, task automations, communication journeys, templates, and approval processes required for the initial implementation.

Response: DSU has not established final counts for workflows, routing rules, alerts, task automations, communication journeys, templates, or approval processes. Vendors should include sufficient configuration to support the priority recruitment, admissions, enrollment, and student-service processes within the initial implementation scope and clearly identify any volume or complexity assumptions. Final requirements and priorities will be established during discovery.

54. IV.D.5.s Contract Documents, Page: 23, **QUESTION:** Will mutually negotiated statements of work, assumptions, change orders, acceptance criteria, and responsibility matrices be incorporated into the executed contract and take precedence for project-specific scope and delivery obligations?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

55. Appendix A - Sections 4 and 7, Page: 46-47, **QUESTION:** What record-retention, archival, legal-hold, purge, and deletion policies apply to prospect, applicant, student, case, communication, and audit data?

Response: DSU generally retains applicable records for approximately 5–7 years. Detailed retention, archival, legal-hold, purge, and deletion requirements will be finalized with the awarded vendor.

56. Appendix A - Section 3.4, Page: 45, **QUESTION:** What rules should govern duplicate detection, contact preferences, communication suppression, ownership, and visibility when multiple departments engage the same prospect or student?

Response: The solution must support applicable email and SMS consent, preference, suppression, opt-out, audit, and regulatory compliance requirements.

57. Appendix A - Sections 5 and 7, Page: 46-47, **QUESTION:** Please clarify the University's required consent, preference, suppression, records-retention, and audit standards for email and SMS, including responsibility for CAN-SPAM, TCPA, carrier-registration, and student-communication policy compliance.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

58. Appendix A - Section 8.1, Page: 47, **QUESTION:** Please identify the University's executive sponsor, product owner, project manager, functional leads, technical leads, data owners, security representatives, and decision-making governance structure.

Response: Appropriate University functional, technical, security, and leadership representatives will participate throughout implementation. Specific roles, governance, and decision timelines will be finalized at project kickoff.

59. Attachment 6 - Pricing Sheet, Page: 33, **QUESTION:** Does the University expect implementation services to be proposed as a firm fixed price, time and materials with a not-to-exceed amount, or a milestone-based hybrid, and will alternative commercial models be considered?

Response: The University has not established a budget range for disclosure. Vendors should submit competitive, fully itemized pricing based on the RFP requirements.

60. Appendix A - Section 4; Attachment 6, Page: 46, 33, **QUESTION:** Who is responsible for procuring and funding source-system API licenses, middleware licenses, vendor professional services, test environments, certificates, short codes, and other third-party integration prerequisites?

Response: Vendors should identify all third-party licenses, services, and prerequisites required for the proposed solution and clearly include or itemize associated costs. Any assumptions regarding DSU-provided API licenses, middleware, professional services, test environments, certificates, short codes, or

other integration dependencies must be clearly stated. Final responsibility for source-system-specific prerequisites will be confirmed during implementation planning.

61. Appendix A - Section 7, Page: 47, **QUESTION:** What accessibility evidence is required, such as a current VPAT or ACR, third-party testing, automated scans, manual assistive-technology testing, remediation reports, and accessibility acceptance criteria for configured or custom experiences?

Response: Vendors should provide a current VPAT/ACR or equivalent accessibility documentation and describe their automated, manual, assistive-technology, and third-party testing practices, as applicable. Configured and custom experiences must meet applicable University accessibility requirements, including WCAG 2.1 AA or applicable successor standards. Known limitations and remediation plans should be disclosed, with final accessibility acceptance criteria established during implementation.

62. IV.D.5.i Costs and Payment Schedules, Page: 21, **QUESTION:** What objective acceptance criteria, review period, and deemed-acceptance process will be used to release milestone payments and any holdback, and who will have authority to approve each deliverable?

Response: Acceptance will be based on agreed requirements, deliverables, testing results, and milestone criteria. Appropriate designated University functional and/or technical representatives will approve deliverables. Specific review periods, deemed-acceptance provisions, milestone-payment requirements, and any holdback terms will be established in the final contract.

63. Appendix A - Section 8.1, Page: 47, **QUESTION:** Are there University change freezes, CAB approvals, security gates, procurement lead times, network changes, certificate processes, or vendor-access onboarding steps that must be included in the project schedule?

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

64. Appendix A - Section 8.1, Page: 47, **QUESTION:** What weekly availability can the University commit from business and technical SMEs for discovery, design reviews, data mapping, content decisions, testing, training, and issue resolution?

Response: Appropriate University functional, technical, security, and leadership representatives will participate throughout implementation. Specific roles, governance, and decision timelines will be finalized at project kickoff.

65. Appendix A - Sections 7 and 8, Page: 47, **QUESTION:** What data-masking, anonymization, or synthetic-data requirements apply to development, testing, training, and UAT environments, and who will provide compliant test data?

Response: Non-production environments must appropriately protect sensitive and student data in accordance with applicable DSU security, privacy, FERPA, and data-governance requirements. Production data should be masked, anonymized, de-identified, or replaced with synthetic data where appropriate. Vendors should describe their recommended approach and capabilities; specific test-data requirements and responsibilities will be established during implementation.

66. Appendix A - Sections 3.4 and 5, Page: 45-46, **QUESTION:** How many prospective students, applicants, admitted students, and other external users are expected to access authenticated or

unauthenticated digital experiences, and what transactions must they complete in the CRM?

Response: Vendors should plan for approximately 20,000–35,000 external applicant/student users annually, subject to enrollment and recruitment growth. The solution should scale to support prospective, applicant, admitted, and other applicable external users. Transactions may include inquiries, application-related activities, event registration, status/checklist review, document submission, appointments, communication preferences, and self-service. Vendors should identify any external-user licensing, authentication, volume, or transaction limitations and associated costs.

67. Appendix A - Section 3.2, Page: 45, **QUESTION:** Please identify all lead and inquiry sources, web properties, form tools, event platforms, purchased-list providers, and external data feeds that must be integrated or replaced, including estimated counts and annual volumes.

Response: Lead and inquiry sources include University web properties/forms, recruitment events, digital campaigns, prospect lists, partner organizations, school/counselor outreach, and third-party application/data sources. Exact source counts and annual volumes have not been finalized. The CRM should support integration through APIs, web forms, secure data feeds, and file imports as appropriate. Final source inventory, volumes, and retain/integrate/replace decisions will be established during implementation.

68. Appendix A - Sections 3.2 and 5, Page: 45-46, **QUESTION:** Does the University require end-to-end event management, including event creation, registration pages, capacity and waitlists, reminders, QR or on-site check-in, guest management, virtual events, payments, and post-event follow-up?

Response: DSU seeks end-to-end event-management capabilities, including event creation, registration, capacity/waitlists, automated communications, guest management, electronic/QR check-in, virtual and in-person events, attendance tracking, and post-event follow-up. Payment functionality should be supported where applicable through appropriate integration. Vendors should identify any functionality requiring third-party products or additional costs.

69. Appendix A - Section 3.1, Page: 45, **QUESTION:** Are all listed student populations mandatory for the initial implementation, and please identify any additional populations, programs, terms, or recruitment models that require unique processes.

Response: The solution should ultimately support all student populations identified in the RFP; however, DSU is open to a phased implementation. Vendors should support configurable variations in workflows, communications, admissions requirements, terms, and recruitment processes by population and program. Final phasing and population-specific requirements will be established during implementation planning.

70. Appendix A - Section 8.1, Page: 47, **QUESTION:** What current-state process maps, requirements, data dictionaries, integration specifications, reports, forms, templates, and policy documentation are available at project start?

Response: DSU will provide available current-state process, system, integration, reporting, form, template, data, and policy documentation at project initiation. Documentation availability and completeness may vary by functional area. Vendors should anticipate conducting discovery and validation activities to address gaps and develop required future-state process, requirements, data, integration, and configuration documentation.

71. Appendix A - Section 4.2, Page: 46, **QUESTION:** Which LMS courses, modules, events, completion statuses, engagement indicators, and early-alert conditions must be synchronized, and what actions should the CRM initiate for each condition?

Response: DSU has not established a final set of LMS data elements or early-alert conditions. The CRM should support configurable integration of relevant LMS engagement and completion data and enable automated communications, alerts, tasks, cases, or staff follow-up based on defined conditions. Final synchronization requirements, triggers, and actions will be established during implementation.

72. Appendix A - Sections 5 and 8.2, Page: 46-47, **QUESTION:** How many existing email, SMS, letter, notification, and event templates must be migrated or redesigned, and who will provide approved content, branding standards, translations, and legal review?

Response: DSU has not established a final count of existing email, SMS, letter, notification, or event templates to be migrated or redesigned. Vendors should anticipate supporting the review, migration, configuration, and optimization of priority enrollment and recruitment communications as part of implementation and clearly identify any assumptions or limitations regarding template volumes.

DSU will provide or approve applicable institutional content, branding standards, and business requirements. The vendor should support template design, configuration, accessibility, testing, and best-practice recommendations. Translation and legal/compliance review will be coordinated with the appropriate University stakeholders where required. Final template inventory, ownership, and migration priorities will be established during discovery

73. Appendix A - Sections 8.2 and 10, Page: 47-48, **QUESTION:** What duration, hours of coverage, staffing, incident volume, and exit criteria are expected for stabilization or hypercare following each go-live?

Response: DSU expects the selected vendor to provide an appropriate post-go-live stabilization/hypercare period following each production deployment. Vendors should recommend the duration, hours of coverage, staffing model, escalation procedures, and incident-management approach based on the proposed implementation and deployment strategy.

Hypercare should provide enhanced support for issue identification, triage, remediation, integration monitoring, and user support during the transition to normal operations. Exit criteria should include resolution or documented disposition of critical/high-priority issues, system and integration stability, successful transition of support responsibilities, and completion of required knowledge transfer. Vendors should clearly identify any assumptions, limitations, and associated costs.

74. IV.D.5.h Warranty, Page: 21, **QUESTION:** Please confirm whether the warranty applies only to defects in vendor-developed configuration and deliverables against mutually approved requirements, and excludes Salesforce product defects, third-party changes, University changes, new requirements, and post-acceptance enhancements.

Response: Warranty requirements will be governed by the RFP and final contract. Vendors will be responsible for ensuring vendor-developed configurations and deliverables conform to approved requirements and acceptance criteria. Any proposed exclusions related to platform/product defects, third-party or University changes, new requirements, or post-acceptance enhancements should be clearly identified and are subject to University review and approval.

75. Appendix A - Section 10, Page: 48, **QUESTION:** Should the vendor pass through Salesforce's published uptime commitment, or is the University requesting a separate end-to-end SLA that includes integrations, third-party communications, and University-controlled systems?

Response: Vendors should provide the applicable platform uptime and availability commitments for their proposed solution. DSU expects clearly defined service levels for components within the vendor's control, including the CRM platform and vendor-managed integrations or services. Vendors should also describe dependencies on third-party communication services, external integrations, and University-controlled systems and identify how incidents involving those dependencies will be monitored, escalated, and coordinated.

DSU does not expect vendors to guarantee the availability or performance of systems outside their reasonable control; however, vendors should clearly define end-to-end monitoring, incident-management, and escalation responsibilities.

76. Appendix A - Sections 2 and 11, Page: 44, 48, **QUESTION:** What current-state baselines and target improvements will be used to measure project success, and will vendor performance be evaluated on implementation deliverables or on enrollment outcomes that are also influenced by University policy, staffing, market conditions, and recruitment strategy?

Response: Project success will be measured primarily against successful implementation and operational performance, including completion of agreed-upon deliverables, functionality, integrations, data migration, testing/UAT, training, system performance, adoption, and achievement of agreed implementation milestones and acceptance criteria.

DSU also intends to monitor enrollment-management outcomes such as funnel conversion, application completion, engagement, yield, and enrollment melt. However, these outcomes are influenced by multiple institutional and external factors. Accordingly, vendor contractual performance will not be evaluated solely on enrollment outcomes. The selected vendor should work with DSU during implementation to establish appropriate baseline metrics, dashboards, and recommended performance targets.

77. Appendix A - Section 7, Page: 47, **QUESTION:** Will the University require a FERPA data-protection agreement, data-processing addendum, security plan, records-retention schedule, or specific contractual clauses in addition to the RFP, and may vendors review those documents before proposal submission?

Response: The selected vendor will be required to comply with applicable University, state, and federal requirements related to FERPA, data privacy, information security, records retention, and protection of University data. Additional agreements or documentation, such as a data-processing/data-protection agreement, security documentation, records-retention requirements, or other contractual provisions, may be required based on the proposed solution and University review.

Any additional documents available and approved for distribution during the solicitation period may be provided through the appropriate procurement process. Final contractual and security requirements will be addressed with the selected vendor as part of contract negotiation and security review.

78. Appendix A - Section 8.1, Page: 47, **QUESTION:** What decision and approval turnaround times can the University commit to for requirements, design, security, integrations, data mapping, content, testing, and deliverable acceptance?

Response: DSU will make reasonable efforts to provide timely decisions and approvals consistent with the agreed-upon implementation schedule. Vendors should identify key decision points, dependencies, and recommended turnaround times in their project plan. Specific approval timelines and escalation procedures will be established collaboratively during project initiation.

79. IV.D.5.i Costs and Payment Schedules, Page: 21, **QUESTION:** Please define the anticipated payment milestones, invoice approval process, and maximum percentage or dollar amount of retainage that may be applied to software subscriptions, third-party costs, and professional services.

Response: Payment milestones and invoicing requirements will be finalized as part of contract negotiations and will align with University procurement and payment policies. Vendors should propose an appropriate milestone-based payment schedule tied to defined deliverables, acceptance criteria, and project progress. Software subscriptions, third-party/pass-through costs, and professional services should be clearly itemized.

DSU has not established a specific retainage percentage or dollar amount through this clarification. Any applicable retainage, invoice approval requirements, and payment terms will be governed by the final contract and University policies.

80. I. Overview - Schedule of Events, Page: 4, **QUESTION:** Given the short period between published answers, proposal due date, selection, contract execution, and projected start, please confirm whether October 1 is an administrative contract date or the expected project kickoff date, and whether the date will shift if award or contracting is delayed.

Response: October 1, 2026 is the projected contract start date and is subject to completion of the procurement and contracting process. Subsequent milestones may be adjusted as necessary.

81. Appendix A - Section 3.3, Page: 45, **QUESTION:** How does the University define enrollment melt, which behaviors or data points should trigger intervention, what outreach actions are expected, and are predictive scores required at initial go-live?

Response: DSU currently measures enrollment melt through Institutional Research and internal systems. The CRM should enhance the University's ability to identify at-risk students and support timely intervention; predictive capabilities are desired.

82. V.2 Evaluation Criteria; Appendix A - Section 5, Page: 14, 46, **QUESTION:** Which social media channels and social listening, publishing, direct-message, case-creation, and attribution capabilities are mandatory, and what existing social platform should be integrated?

Response: DSU has not identified a specific social media platform that must be integrated. Vendors should describe available capabilities for major social channels, including publishing, listening, direct-message engagement, case creation, campaign tracking, and attribution. These capabilities may be considered value-added unless otherwise identified as required in the RFP. Final social channel and integration requirements will be established during implementation.

83. Appendix A - Section 3.1, Page: 45, **QUESTION:** Please confirm whether custom Apex, Lightning Web Components, integration code, or managed packages are permitted where

required for complex integrations or user experiences, or whether the University requires a no-code solution for all capabilities.

Response: DSU does not require a completely no-code solution. The expectation is that routine business processes, workflows, communications, forms, reporting, and standard configuration changes should be manageable through native administrative tools without custom development. Where necessary to support complex integrations, specialized functionality, or user experiences, custom development may be proposed.

For vendors proposing Salesforce, this may include Apex, Lightning Web Components, integration code, or managed packages where justified. Vendors should clearly identify all custom components, explain why they are necessary, and describe associated security, maintenance, upgrade, testing, licensing, and long-term support implications.

84. Appendix A - Sections 6 and 10, Page: 47-48, **QUESTION:** What release-management, change-approval, source-control, deployment, regression-testing, and Salesforce seasonal-release support processes are required after go-live?

Response: DSU expects the proposed solution to support a structured post-go-live release and change-management process, including documented change requests, appropriate University approval, source/version control where applicable, controlled deployment between environments, regression testing, release documentation, and rollback procedures. Vendors should describe their recommended governance and release-management approach and clearly define responsibilities among DSU, the software provider, and any implementation/support partner.

For Salesforce or other SaaS platforms with scheduled vendor releases, vendors should describe how seasonal/platform releases are assessed, tested, communicated, and supported to minimize operational impact. Final change-approval and release-management procedures will be established during implementation.

85. Appendix A - Sections 3.3 and 4.3, Page: 45-46, **QUESTION:** How much historical data must be available for trend and cohort analysis, what refresh frequency is required for each data source, and are point-in-time snapshots or a dedicated analytics repository required?

Response: DSU anticipates approximately **5–7 years of relevant historical data**, where available, for trend and cohort analysis. Time-sensitive enrollment data should support real-time or near-real-time updates, with scheduled/batch refreshes used where appropriate. DSU has not mandated point-in-time snapshots or a dedicated analytics repository; vendors should recommend an approach that supports historical, cohort, trend, and predictive analysis.

86. Appendix A - Section 3.4, Page: 45, **QUESTION:** Is a Salesforce knowledge base to be created or migrated, how many articles and content owners are involved, and must knowledge be available to staff, public users, authenticated users, bots, or all of these audiences?

Response: DSU has not prescribed a Salesforce-specific knowledge base or established a defined number of articles for migration. The solution should support knowledge content for staff, public and authenticated users, and chatbot/self-service experiences where appropriate. Final content inventory, ownership, migration scope, and audience requirements will be established during implementation.

87. Appendix A - Sections 4 and 10, Page: 46, 48, **QUESTION:** After go-live, which party will

monitor, support, and remediate each integration, and what level of managed integration support should be included in Years 1 through 5?

Response: Following go-live, DSU anticipates shared responsibility for integration support. University IT and designated system administrators will support routine monitoring and coordination, while the CRM/software provider and implementation partner will remain responsible for platform-specific issues and remediation associated with integrations they provide or configure.

Vendors should clearly define the proposed post-go-live integration support model, including monitoring, incident response, troubleshooting, escalation, maintenance, and responsibilities across DSU, the software provider, and implementation partner. Required support necessary to maintain implemented integrations should be included in the base proposal for the applicable contract term. Any enhanced or optional managed integration services should be separately identified and priced.

88. Page 3 Contract Term; Appendix A - Section 8, Page: 3, 47, **QUESTION:** What implementation duration does the University anticipate, and how should the three-year term be divided between implementation, stabilization, and ongoing support or managed services?

Response: DSU anticipates an implementation period beginning with the projected October 1, 2026 contract start date and supporting a target production go-live of March 1, 2027, subject to completion of procurement and contracting. The implementation should include discovery, design/configuration, integration, data migration, testing/UAT, training, deployment, and transition to production.

Following go-live, the vendor should provide an appropriate stabilization/hypercare period before transitioning to ongoing support. The remainder of the three-year base term should provide required platform support, maintenance, and other contracted services. Any optional managed services or enhancement support should be separately identified and priced. Vendors may recommend an alternative allocation of implementation and stabilization activities where it improves project outcomes while maintaining the target go-live.

89. Attachment 6 - Optional Services, Page: 34, **QUESTION:** Which AI use cases are of interest, such as lead scoring, next-best action, generative email, chatbots, case summarization, or forecasting, and what University policies govern use of student data with generative AI?

Response: Desired capabilities include likelihood to apply, application-completion risk, likelihood to deposit, enrollment forecasting, melt risk, generative email, and other responsible CRM-native AI capabilities. Any use of AI must comply with applicable FERPA privacy, security, data-governance, and University requirements. Vendors should clearly describe governance, privacy, and data-use controls. Final AI use cases and governance requirements will be established during implementation and security/privacy review.

90. IV.B.13-14 Subcontracting; Attachment 5, Page: 10-11, 32, **QUESTION:** Should Salesforce, telecommunications carriers, cloud infrastructure providers, managed-package vendors, and other standard software subprocessors be identified as subcontractors on Attachment 5, or is the form limited to firms performing professional services under the prime vendor's direction?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

91. Appendix A - Sections 7 and 10; Termination Provisions, Page: 47-48, 21, **QUESTION:** What

data-export, transition-assistance, configuration-documentation, retention, deletion-certification, and post-termination support requirements must be included, and for how long after contract end?

Response: The selected vendor must support an orderly transition at contract expiration or termination, including export of University data in a commonly usable format and delivery of applicable configuration and technical documentation. Vendors should identify their standard transition-assistance, data-retention, deletion-certification, and post-termination support practices and any associated costs. Final retention periods, transition requirements, and post-termination support duration will be governed by the final contract and applicable University requirements.

92. Appendix A - Section 3.4, Page: 45, **QUESTION:** Please define required service-level agreements by channel and case type, business hours and holidays, escalation tiers, first-contact-resolution definitions, and any required entitlement or milestone functionality.

Response: DSU has not established final SLAs by channel or case type. The solution should support configurable business hours, holiday calendars, case priorities, escalation tiers, entitlements, milestones, and response/resolution targets. Vendors should describe available capabilities and recommended practices. Final SLAs, first-contact-resolution definitions, operating hours, and escalation requirements will be established during implementation.

93. Attachment 6 - Hosting / Storage, Page: 33, **QUESTION:** Please clarify whether Salesforce-hosted SaaS is acceptable, whether any University-managed hosting is required, and how storage overages, archival, backup, and file-storage growth should be priced over five years.

Response: Cloud-hosted SaaS solutions are acceptable, subject to applicable University security, privacy, accessibility, and contractual requirements; University-managed hosting is not required. Vendors should identify included storage, backup, archival, and file-storage capacity and clearly disclose any anticipated overage or usage-based costs for the three-year base term and two optional one-year extensions.

94. Attachment 6; Appendix A - Section 10, Page: 33-34, 48, **QUESTION:** What Salesforce support plan is expected, such as Standard, Premier, or Signature, and should JourneyBlazers provide separate application administration and managed support in addition to Salesforce product support?

Response: DSU has not prescribed a specific Salesforce support plan, as Salesforce has not been designated as the required CRM platform. Vendors proposing Salesforce should recommend the appropriate Salesforce product support level based on the proposed solution and clearly identify all associated costs. Any separate application administration, managed support, enhancement services, or other post-go-live services proposed by the implementation partner should be clearly distinguished from the software publisher's product support and separately priced.

95. Appendix A - Section 10; Attachment 6, Page: 48, 34, **QUESTION:** Should Years 2 through 5 include a defined pool of managed-services or enhancement hours, and if so, what annual capacity, skill mix, prioritization process, and rollover rules are expected?

Response: DSU has not established a required pool of managed-services or enhancement hours for Years 2 through 5. Vendors may propose and separately price optional support, including recommended annual hours, skill mix, prioritization process, and rollover provisions. Required platform support should be clearly distinguished from optional enhancement services.

96. Appendix A - Sections 8-9, Page: 47, **QUESTION:** How many non-production environments are required for development, integration testing, training, UAT, staging, and release management, and are any Salesforce sandboxes already available?

Response: DSU has not prescribed a specific number of non-production environments. Vendors should propose the environment structure necessary to support development, integration testing, training, UAT, staging, and release management and identify all associated costs. Vendors should not assume existing Salesforce sandboxes are available.

97. Appendix A - Section 8.2, Page: 47, **QUESTION:** How many Salesforce administrators, developers, analysts, and support personnel will receive knowledge transfer, and what level of post-project self-sufficiency, certification preparation, and technical documentation is expected?

Response: The selected vendor should provide appropriate knowledge transfer and technical documentation to designated University administrative, technical, analytical, and functional staff to support post-project self-sufficiency. Vendors should recommend any certification preparation or specialized training appropriate to the proposed platform and identify associated costs.

98. Appendix B - Section D, Page: 51, **QUESTION:** Please confirm that unlimited liability applies only to losses proximately caused by the awarded vendor's breach of its contractual obligations, excludes University acts or omissions and third-party platform events outside the vendor's control, and does not apply to professional-services errors unrelated to a security breach.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

99. Appendix B - Section E, Page: 51, **QUESTION:** Please provide the anticipated maximum number of PII records, the required cyber liability coverage amount, and whether Salesforce-hosted records and historical or archived records are included in the count.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

100. Appendix B - Section C, Page: 50-51, **QUESTION:** Please define the required initial notification timeframe in hours, the incident-classification threshold, and whether reporting obligations apply only to incidents confirmed to affect University data.

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

101. IV.D.5.j Penalties, Page: 21, **QUESTION:** Please provide the proposed liquidated-damages structure, triggering events, cure periods, service credits, and maximum aggregate liability so vendors can evaluate and price the associated risk.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

102. Appendix A - Section 4.3, Page: 46, **QUESTION:** Which specific regulatory, audit, accreditation, state, federal, and internal compliance reports must the solution produce, and what retention, certification, and export formats are required?

Response: The solution should provide configurable dashboards, reports, exports, and scheduled

distributions by user role. The detailed reporting inventory and priorities will be finalized during discovery.

103. Appendix A - Section 5, Page: 46, **QUESTION:** Please clarify whether event communications must be orchestrated within the CRM or an existing marketing platform and identify required event data, registration sources, attendance methods, and attribution rules.

Response: DSU prefers event communications to be orchestrated through the CRM, with integration to retained event or marketing platforms as appropriate. The solution should support registration, communications, attendance/check-in, cancellations, waitlists, and post-event follow-up, with registration originating from CRM or approved external sources. Event participation should be attributable to relevant campaigns, recruitment sources, student records, and enrollment outcomes. Final data and attribution requirements will be established during implementation.

104. IV.D.5.r Work Product, Page: 22, **QUESTION:** Please confirm that the work-product provision excludes Salesforce and third-party intellectual property, vendor pre-existing tools, accelerators, templates, methods, reusable code, and generalized know-how, while granting the University ownership or appropriate rights to project-specific deliverables.

Response: The University recognizes that vendors and third-party software providers may retain ownership of their pre-existing intellectual property, proprietary tools, methodologies, templates, software, and other materials developed independently of this engagement. Ownership and permitted use of project-specific deliverables, configurations, documentation, and other work product created specifically for DSU will be governed by the RFP and final negotiated contract. Any requested exceptions or clarifications regarding intellectual-property rights should be clearly identified in the vendor's proposal and are subject to University review and approval.

105. IV.B.5 Proposal Expiration Date; Attachment 6, Page: 9, 33-35, **QUESTION:** May annual software subscription and support pricing increase during Years 2 through 5, and if so, what escalation methodology or maximum annual percentage is permitted for base and optional renewal years?

Response: Vendors should provide pricing for each year of the three-year base term and two optional one-year extensions. Any proposed annual subscription, licensing, or support increases must be clearly identified in the pricing proposal and will be subject to University procurement requirements and the final contract.

106. V.2 Proposal Selection Criteria, Page: 14, **QUESTION:** Please clarify whether the 35-point pricing score will be based on the three-year base contract total, the full potential five-year contract value, Year 1 cost, or another formula, and whether optional services will be included in the evaluated price.

Response: Vendors should provide complete pricing for the three-year base term and two optional one-year extensions as required by the RFP. Optional/value-added services should be separately priced and excluded from the mandatory evaluated price unless otherwise identified as required. The 35-point pricing evaluation will be calculated in accordance with the University's procurement procedures.

107. IV.D.5.a Independent Contractors, Page: 17, **QUESTION:** What level of on-site presence is required for discovery, design, testing, training, go-live, and support, and should travel and expenses be included in the fixed price or billed separately at actual cost?

Response: DSU is open to a virtual, on-site, or hybrid implementation approach. Vendors should recommend the appropriate level of on-site presence for discovery, design, testing, training, go-live, and stabilization based on their implementation methodology and the needs of the University. On-site participation may be requested for key implementation activities where it would materially support project success.

Vendors should clearly identify all anticipated travel requirements and associated costs in their pricing proposal. Any travel necessary to deliver the required scope should be included in the proposed implementation cost unless separately identified and approved by the University.

108. Appendix B - Section C, Page: 50-51, **QUESTION:** Does the University require annual incident-response exercises, tabletop testing, breach-notification templates, designated 24x7 security contacts, or integration with the University's security operations center?

Response: Vendors should provide their standard enterprise SLA, including uptime, support hours, severity levels, response/resolution targets, escalation procedures, maintenance practices, and disaster-recovery commitments for evaluation by the University.

109. Appendix A - Sections 3.1-3.3, Page: 45, **QUESTION:** How many active recruitment cycles, entry terms, academic calendars, and overlapping campaigns must be supported concurrently, and how far in advance are future terms created?

Response: The CRM should support multiple concurrent recruitment cycles and overlapping campaigns, including Fall, Spring, Summer, and rolling admissions where applicable. Future-dated terms and recruitment cycles should be configurable sufficiently in advance to support recruitment and enrollment planning. Exact cycle counts may vary annually and by population/program.

110. Appendix A - Section 3.2, Page: 45, **QUESTION:** What assignment models are required, such as geography, program, population, last name, workload, language, or round-robin, and must reassignment, territory management, and capacity balancing be automated?

Response: The solution should support both manual and automated counselor assignment using configurable criteria such as geography, student population, program, territory, source, and workload.

111. Appendix A - Sections 1 and 5, Page: 44, 46, **QUESTION:** Are multilingual user interfaces, content, email, SMS, knowledge, or portal experiences required, and if so, which languages and accessibility review processes are in scope?

Response: Multilingual functionality is not a mandatory requirement for the initial implementation; however, vendors should identify available multilingual and translation capabilities. All student-facing interfaces and content should meet applicable accessibility requirements, including WCAG 2.1 AA. Specific language needs and accessibility review processes will be finalized during implementation.

112. IV.E.3 Production Environment Requirements, Page: 25, **QUESTION:** Does this requirement apply at the overall Salesforce platform level, to every individual Salesforce feature proposed, and to partner-developed configurations or integrations that are unique to the University?

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

113. IV.D.5.i; Page 25 Payment Terms, Page: 21, 25, **QUESTION:** Will the University accept monthly invoicing for time-based services and milestone invoicing for fixed-price deliverables, and will undisputed invoice amounts be paid while disputed items are being resolved?

Response: Invoicing schedules and payment terms will be established in the final contract in accordance with University requirements. Vendors may propose monthly invoicing for time-based services and milestone invoicing for fixed-price deliverables for consideration.

114. Attachment 6 - Pricing Sheet, Page: 33-35, **QUESTION:** Does the University have a separate funding allocation or not-to-exceed amount for optional and value-added services, and should optional services be excluded from the mandatory total evaluated price?

Response: DSU has not established a separate budget or not-to-exceed amount for optional/value-added services. All costs required to meet the core RFP requirements should be included in the mandatory total price, while optional/value-added services should be separately identified and priced for independent evaluation.

115. Attachment 7 - Financial Responsibility, Page: 36-42, **QUESTION:** For privately held small businesses, will internally prepared financial statements, tax returns, bank letters, or a parent/owner financial assurance be accepted in lieu of audited statements and formal credit ratings?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

116. IV.D.5.y Audit Access to Records, Page: 24, **QUESTION:** Please confirm that audit rights will be limited to records directly related to the contract, conducted with reasonable notice during business hours, subject to confidentiality, and will not require disclosure of unrelated client data, proprietary rate build-ups, or Salesforce confidential information.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

117. IV.D.5.q Background Checks, Page: 22, **QUESTION:** Will background checks apply to remote personnel who only access University systems, and what specific checks, recurrence, turnaround time, and cost allocation are required?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

118. IV.D.5.z Status Reporting, Page: 24, **QUESTION:** What meeting cadence, reporting templates, project-management tools, issue and risk logs, executive steering updates, and documentation repositories must the vendor use?

Response: Vendors should propose a structured project-management approach that includes regular project meetings, status reporting, project plans, issue/risk/decision tracking, executive updates, and centralized documentation. DSU is open to vendor-recommended tools and templates. Final cadence, governance structure, reporting requirements, and documentation processes will be established during project initiation.

119. RFP Submission Requirements; Attachment 7, Page: 2, 37-40, **QUESTION:** Will hyperlinks to secure financial statements satisfy Attachment 7, and may confidential financial documents be

submitted separately if their inclusion would exceed the 5 MB single-file limit?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

120. V.2 Evaluation Criteria - ACA Fee Note, Page: 14-15, **QUESTION:** Will professional-services personnel working under vendor management and supervision be considered subject to the ACA Safe Harbor fee, and if so, what fee methodology should be used for remote, hybrid, or on-site consultants?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

121. Attachment 6 - Pricing Sheet, Page: 33, **QUESTION:** Is Delaware State University exempt from applicable sales, use, telecommunications, or software taxes, and will the University provide its tax-exemption certificate before contracting?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

122. I. Overview - Question Submission Format, Page: 5, **QUESTION:** For passages that span multiple sections or pages, may vendors cite a page range and combined section references in one question, or must each related passage be submitted as a separate numbered question?

Response: Vendors may cite a page range and combined section references when a single question clearly relates to the same requirement.

Questions 12: Tuesday 8/4/2026

1. **Section number:** Appendix A, Section 3.1. **Paragraph number:** 3.1. **Page number:** 45. **Text of passage being questioned:** "The system must be configurable through administrative tools and should not require custom source-code development for standard workflow changes."

Question: Does Delaware State University have a preferred CRM platform, including Salesforce Education Cloud, or is the University requesting that vendors recommend and provide the underlying CRM platform as part of the proposed solution?

Response: DSU has not identified a preferred CRM platform. Vendors should propose the platform and solution that best meets the requirements of the RFP.

2. **Section number:** Appendix A, Section 3.1. **Paragraph number:** 3.1. **Page number:** 45. **Text of passage being questioned:** "The proposed CRM solution must support end-to-end lifecycle management for multiple student populations."

Question: Has the University already purchased or provisioned any CRM-related licenses, including Salesforce Education Cloud, Sales Cloud, Service Cloud, Marketing Cloud, Data Cloud, Experience Cloud, MuleSoft, or related products? If so, please identify the products, editions, quantities, contract terms, and available environments.

Response: The University has not identified a preferred CRM platform. Vendors should propose the solution that best satisfies the functional, technical, security, accessibility, and integration

requirements of the RFP.

3. **Section number:** Appendix A, Section 3.2. **Paragraph number:** 3.2. **Page number:** 45. **Text of passage being questioned:** “Centralized management of prospects, inquiries, applicants, and admitted students.”

Question: Please identify the systems currently used to manage prospects, inquiries, applications, admitted students, deposits, and enrolled students, and indicate whether the University intends to retain, integrate, consolidate, or replace each system.

Response: DSU currently utilizes an admissions/enrollment CRM, Ellucian Banner 9, external application platforms, and other University systems to manage the student lifecycle. The current CRM is expected to be replaced, while Banner will remain the authoritative SIS and applicable application and enterprise systems will be retained and integrated. Final retain/integrate/consolidate/replace decisions will be confirmed during implementation.

4. **Section number:** Appendix A, Section 3.2. **Paragraph number:** 3.2. **Page number:** 45. **Text of passage being questioned:** “Application workflow management, including initiation, completion tracking, and checklist monitoring.”

Question: Is the selected CRM expected to serve as the University’s primary application platform, or will applications continue to be submitted and processed through an existing application system that integrates with the CRM? Please identify the current application platforms and application sources.

Response: Applications will continue to originate from existing external application systems. The CRM should integrate with those systems and support application tracking, checklist monitoring, and enrollment workflows.

5. **Section number:** Appendix A, Section 3.1. **Paragraph number:** 3.1. **Page number:** 45. **Text of passage being questioned:** “The proposed CRM solution must support end-to-end lifecycle management for multiple student populations, including undergraduate, graduate, transfer, online, international, adult, and dual enrollment students.”

Question: Are all listed student populations expected to be included in the initial implementation, or does the University anticipate a phased rollout? Please identify the populations, departments, colleges, campuses, and business units included in the initial phase.

Response: The solution should ultimately support all student populations identified in the RFP. DSU is open to a phased rollout, with the initial phase primarily focused on Strategic Enrollment Management and admissions/recruitment-related functions. Final population, functional-area, and business-unit sequencing will be established with the selected vendor during implementation planning.

6. **Section number:** Appendix A, Section 3.2. **Paragraph number:** 3.2. **Page number:** 45. **Text of passage being questioned:** “Admissions counselor assignment, caseload tracking, and activity

logging.”

Question: Please provide the anticipated number of CRM users by role, including admissions counselors, recruiters, enrollment managers, student-service representatives, marketing users, administrators, executive users, and read-only users.

Response: DSU anticipates approximately 30 initial internal CRM users across admissions/recruitment, enrollment management, student services, marketing, administration, reporting, and leadership roles. Exact counts by role will be finalized during implementation. Vendors should provide scalable licensing options for full-access, administrative, executive, and read-only users.

7. **Section number:** Appendix A, Section 3.4. **Paragraph number:** 3.4. **Page number:** 45. **Text of passage being questioned:** “Centralized inquiry and case management for admissions and enrollment services.”

Question: Which University departments and inquiry types are expected to use case management during the initial implementation? Please clarify whether the scope is limited to admissions and enrollment services or also includes financial aid, registrar, student accounts, housing, advising, information technology, or other student-service functions.

Response: Initial case management will primarily support Admissions and enrollment-related student services, including prospective student, applicant, application, recruitment, and enrollment inquiries. The solution should be scalable to support Financial Aid, Registrar, Student Accounts, Housing, Advising, IT, and other student-service functions in future phases. Specific case types, routing, service levels, and expansion priorities will be finalized during implementation.

8. **Section number:** Appendix A, Section 4.1. **Paragraph number:** 4.1. **Page number:** 46. **Text of passage being questioned:** “The Contractor shall provide bi-directional integration with the University’s Student Information System.”

Question: Please identify the University’s current Student Information System, including product name, version, hosting model, available APIs or integration technologies, and any planned upgrades or replacement initiatives during the contract period.

Response: DSU currently uses Ellucian Banner 9 on-premises. Ellucian Ethos is available as an API layer, and vendors may recommend additional appropriate integration approaches.

9. **Section number:** Appendix A, Section 4.1. **Paragraph number:** 4.1. **Page number:** 46. **Text of passage being questioned:** “Synchronization of student biographic, academic, and enrollment data” and “Exchange of admissions decisions, program data, and term information.”

Question: Please provide the anticipated data objects, transactions, integration frequency, approximate record volumes, and system-of-record ownership for the required SIS integration. Please also indicate whether existing APIs, interface specifications, data dictionaries, or

integration documentation will be provided.

Response: The SIS integration will support bi-directional exchange of student biographic, admissions, program, term, enrollment, decision, deposit/fee, and status data with Ellucian Banner 9. Time-sensitive transactions should support real-time or near-real-time processing, with batch processing used where appropriate. Banner will remain the system of record for official student and enrollment data, while the CRM will support recruitment and engagement workflows. Ellucian Ethos and available API/interface documentation may be leveraged, with detailed data mappings and volumes finalized during implementation.

10. **Section number:** Appendix A, Section 4.2. **Paragraph number:** 4.2. **Page number:** 46. **Text of passage being questioned:** “The CRM shall integrate with the University’s Learning Management System.”

Question: Please identify the University’s Learning Management System, including product name, version, hosting model, available APIs, and the specific LMS data and engagement events that must be exchanged with the CRM.

Response: Canvas is the University’s current LMS. API-based integration is preferred where appropriate; specific data elements, triggers, and timing will be finalized during implementation.

11. **Section number:** Appendix A, Sections 4.1 and 4.2. **Paragraph number:** 4.1 and 4.2. **Page number:** 46. **Text of passage being questioned:** “The Contractor shall provide bi-directional integration with the University’s Student Information System” and “The CRM shall integrate with the University’s Learning Management System.”

Question: Does the University currently use an enterprise integration platform, middleware product, API gateway, data warehouse, or integration partner that the selected vendor will be required to use? If so, please identify the technology and the University resources available to support integration development.

Response: DSU currently uses Ellucian Banner 9 on-premises. Ellucian Ethos is available as an API layer, and vendors may recommend additional appropriate integration approaches.

12. **Section number:** Appendix A, Section 5. **Paragraph number:** Section 5. **Page number:** 46. **Text of passage being questioned:** “The CRM system must support or integrate with omnichannel communications.”

Question: Please identify the University’s current email, SMS, telephony, event-management, social media, and marketing-automation platforms, and indicate which systems the University intends to retain, replace, or integrate.

Response: DSU currently utilizes multiple University and departmental platforms to support email, SMS, telephony, events, social media, and marketing communications. The current admissions/enrollment CRM is expected to be replaced, while other institutional platforms may be retained and integrated as appropriate. Final retain/replace/integrate decisions will be

confirmed during discovery and solution design.

13. **Section number:** Appendix A, Section 5. **Paragraph number:** Section 5. **Page number:** 46.

Text of passage being questioned: “Email campaigns and automated messaging” and “SMS/text messaging compliant with applicable regulations.”

Question: Please provide the approximate annual email and SMS volumes, anticipated number of sending domains or business units, and any requirements related to consent management, preference management, dedicated sending infrastructure, short codes, toll-free numbers, or existing messaging agreements.

Response: DSU anticipates approximately 10–15 marketing email campaigns, 4–8 transactional email campaigns, and 10–15 SMS campaigns monthly, with recipient volumes varying by campaign and recruitment cycle. The solution should support multiple enrollment-related sending identities and compliant consent, preference, and opt-in/opt-out management. Vendors should identify recommended sending infrastructure and separately disclose any costs for dedicated domains/IPs, short codes, toll-free numbers, carrier fees, or third-party messaging services.

14. **Section number:** Appendix A, Section 8.1. **Paragraph number:** 8.1. **Page number:** 47. **Text of passage being questioned:** “Data migration support, where applicable.”

Question: Please identify the systems and data sets expected to be migrated, the approximate number of records and years of historical data, and whether attachments, documents, communication history, activities, campaign history, consent records, and audit history are included in the migration scope.

Response: Migration is expected to include relevant prospect/inquiry, application, enrollment, communication, event, activity, campaign, case-management, and consent/preference data from the existing CRM and other applicable enrollment systems. Vendors should anticipate approximately 5–7 years of relevant historical data, where available. Final record counts and the scope of attachments, documents, communication/activity history, campaign history, consent records, and audit history will be determined during discovery and data mapping. Vendors should clearly identify all migration assumptions and associated costs.

15. **Section number:** Appendix A, Section 8.1. **Paragraph number:** 8.1. **Page number:** 47. **Text of passage being questioned:** “Project management and implementation planning” and “System integration, testing, and deployment.”

Question: What is the University’s desired implementation start date, target production launch date, and any fixed recruitment-cycle, application-cycle, term, blackout-period, or regulatory deadlines that the implementation schedule must accommodate?

Response: The target production go-live date is March 1, 2027. Implementation, testing, and staff training should be completed in sufficient time to support this date.

16. **Section number:** Appendix A, Section 10. **Paragraph number:** Section 10. **Page number:** 48.

Text of passage being questioned: “Ongoing technical support offerings” and “Issue escalation procedures.”

Question: Please clarify the expected division of responsibility among the CRM software provider, implementation partner, and University teams following launch, including whether the selected implementation vendor must provide ongoing managed administration, enhancement services, release management, integration monitoring, or end-user support.

Response: Following go-live, DSU anticipates that University functional and technical teams will assume responsibility for routine system administration, configuration, user management, and day-to-day operations following appropriate training and knowledge transfer. The CRM software provider will be responsible for platform-level maintenance, updates, security, and technical support consistent with its service agreement.

The implementation partner should provide post-go-live stabilization, knowledge transfer, and support for implemented integrations and configurations. Vendors should separately describe and price any optional ongoing services, including managed administration, enhancements, release management, integration monitoring, and end-user support, and clearly identify any services required to maintain the proposed solution.

17. **Section number:** Attachment 6. **Paragraph number:** Pricing Sheet. **Page number:** 33–34. **Text of passage being questioned:** “Pricing Sheet – Multi-Year (3-Year Base + 2 Optional Extensions).”

Question: Please provide the anticipated budget range or not-to-exceed amount for software licensing, implementation, integrations, data migration, training, and support over the three-year base term and two optional extension years.

Response: The University has not established a budget range or not-to-exceed amount for disclosure. Vendors should provide competitive, fully itemized pricing for all required software, implementation, integrations, data migration, training, and support for the three-year base term and two optional one-year extensions.

18. **Section number:** Section IV, Contract Terms and Conditions. **Paragraph number:** Costs and Payment Schedules. **Page number:** 21. **Text of passage being questioned:** “The Delaware State University will require a payment schedule based on defined and measurable milestones” and “The Delaware State University may require holdback of contract monies until acceptable performance is demonstrated, as much as 25%.”

Question: Please identify the anticipated payment milestones, acceptance process, and conditions governing any holdback. Would a holdback apply only to professional implementation services, or also to prepaid software subscriptions, third-party licenses, messaging usage, hosting, or other non-cancellable costs?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

Questions 13: Tuesday 8/4/2026

Question 1

Section number Attachment 2: Exceptions Form

Paragraph number whole attachment

Page number 29

Text of passage being questioned attachment 2

Question: Would DSU allow vendors with existing pre-negotiated terms for similar services to rely on those terms, if awarded, rather than including a completed Attachment 2: Exceptions Form as part of the proposal submission?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

Question 2

Section number Attachment 7

Paragraph number Section A – Financial Responsibility Questionnaire; Section 2 – Financial Statement and Conditions

Page number 37

Text of passage being questioned Section 2- Financial Statements and Conditions

Question: We noted that this section requests a public website link or electronic copies of financial statements. As we are a privately held company, our financial statements are not publicly available. Would the University accept a current Dun & Bradstreet (D&B) Business Information Report in lieu of publicly available financial statements? If not, is DSU willing to sign an NDA prior to the RFP submission deadline so that we may provide our audited financial statements in a protected manner?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

Question 2

Section number Attachment 7

Paragraph number Section A – Financial Responsibility Questionnaire; Section 3 – Financial Capacity Indicators

Page number 38-39

Text of passage being questioned Section 3 – Financial Capacity Indicators

Question: As a privately held company, many of the financial capacity metrics requested in Section 3 (e.g., profit margins, liquidity ratios, debt, cash reserves, and lines of credit) are confidential and are not publicly disclosed. Would the University accept a current Dun & Bradstreet (D&B) Business Information Report as evidence of a vendor's financial capacity in lieu of providing these confidential financial metrics? If not, is DSU willing to sign an NDA prior to the RFP submission deadline so that we may provide our audited financial

statements in a protected manner?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

Question 4

Section number Attachment 7

Paragraph number Section B – Financial Stability and Responsibility

Page number 40

Text of passage being questioned 1. Financial Information Requirements

Question: We noted that this section requests a public website link or electronic copies of financial statements. As we are a privately held company, our financial statements are not publicly available. Would the University accept a current Dun & Bradstreet (D&B) Business Information Report in lieu of publicly available financial statements? If not, is DSU willing to sign an NDA prior to the RFP submission deadline so that we may provide our audited financial statements in a protected manner?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

Question 5

Section number Appendix A: Scope of Work

Paragraph number Section 4. System Integration Requirements

Page number 46

Text of passage being questioned Section 4.1 and 4.2

Question: Besides DSU's SIS and LMS can you please list all additional institutional data systems that you expect the CRM to integrate with

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

Questions 14: Tuesday 8/4/2026

1.

Section number: Appendix A, Section 1

Paragraph number: Introduction and Background

Page number: 44

Text of passage being questioned: the statement that the University seeks a comprehensive, scalable enterprise CRM to support admissions, recruitment, enrollment management, and student-facing customer service operations

● **Question:** Does the University currently operate an admissions or enrollment CRM, and if so which product? Is this procurement a replacement of an incumbent system, a consolidation of several separate systems, or a first CRM deployment?

Response: Yes. The University currently operates an admissions/enrollment CRM, which this procurement is intended to replace. The University also seeks to improve integration and coordination across its enrollment systems and processes.

2.

● Section number: Appendix A, Section 2

● Paragraph number: Project Objectives, item 3

● Page number: 44

● Text of passage being questioned: the objective of providing a centralized system for managing prospects, applicants, and admitted students

● **Question:** Are financial aid award communication, housing assignment, orientation registration, and transcript or credential evaluation within scope for CRM workflows, or are those functions retained in other systems with the CRM communicating status only?

Response: These functions will generally remain within their respective University systems of record. The CRM should integrate with applicable systems to receive relevant status and milestone data and support communications, workflows, alerts, and student engagement.

3.

● Section number: Appendix A, Section 3.1

● Paragraph number: CRM Functional Requirements, first paragraph

● Page number: 45

● Text of passage being questioned: the requirement to support end-to-end lifecycle management for undergraduate, graduate, transfer, online, international, adult, and dual enrollment students

● **Question:** How many distinct enrollment funnels does the University expect to go live, by population and by program, and should vendors assume one common lifecycle model with population-specific variations or fully separate pipelines for each population?

Response: The University anticipates distinct enrollment funnels and communication workflows by student population, with additional variations by program where necessary. Vendors should propose a configurable lifecycle model that supports both common institutional stages and population- or program-specific requirements.

Questions 15: Tuesday 8/6/2026

Q1 Page 22 Vendor Activity

Question: Does the Vendor Responsibility preclude respondents from using non-US resources within the United States? Would collaborative discussions (with no actual work performed) with employees outside of the US constitute a violation of this requirement?

Response: The restriction applies to project activities performed under the resulting contract. Vendors may maintain foreign offices or employees performing unrelated functions; however, all work performed in support of DSU under this contract must comply with the Vendor Activity requirements of the RFP. Collaborative discussions involving non-U.S. personnel should not involve University data, systems, or performance of contracted services.

Q2 Section 3.4 Page 45 Student Service and Case Management

Question: Is the institution looking for the CRM to act as a one-stop and/or ticketing platform?

Response: Yes. DSU seeks centralized inquiry and case-management functionality that can serve as a one-stop/ticketing platform for admissions and enrollment-related student services, with the ability to expand to additional service areas.

Q3 Section 4 Paragraph 4.1 Page 46 SIS Integration

Question: Does DSU have a middleware or integration solution in place currently that could be leveraged for the integration? Or would DSU be open to considering an integration solution (e.g., MuleSoft or similar)?

Response: Ellucian Ethos is available as an API/integration layer for Banner. DSU is open to vendor recommendations for additional integration solutions or middleware where appropriate.

Q4 Section 4.1 Page 46 SIS Integration

Question: Is the institution seeking support for both Slate and SIS-side integration or will IT support integration needs for existing systems?

Response: The selected vendor should provide the integration services necessary to deliver the proposed solution, working collaboratively with DSU IT and relevant system owners. Vendors should clearly identify integration responsibilities and any assumptions or University resources required.

Q5 Section 4.4 Paragraph 4.2 Page 46 LMS Integration

Question: What LMS is/are currently in use at DSU?

Response: DSU currently utilizes Canvas as its Learning Management System.

Q6 Section 4 Paragraph 4.3 Page 46 Reporting and Analytics

Question: What institutional reporting/BI tools are in use at DSU?

Response: DSU currently utilizes institutional and system-based reporting tools. The proposed CRM should provide robust native reporting and analytics capabilities and support data export/integration with the University's reporting environment.

Q7 Section 4 Paragraph 4.2 Page 46 LMS Integration

Question: How many triggered communications do you have that are based on LMS engagement indicators?

Response: DSU does not currently have a defined number of LMS-triggered communications for migration. Vendors should propose configurable capabilities that allow LMS engagement indicators to trigger appropriate communications and workflows.

Q8 Section 5 Page 46 Omnichannel Communication Requirements

Question: What email platform(s) are you currently using for student communications?

Response: Student communications currently originate through multiple University and system-supported email tools. The proposed CRM should provide or integrate centralized enrollment communication capabilities and support coordinated messaging across appropriate University units.

Q10 Section 5 Page 46 Omnichannel Communication Requirements

Question: How do other departments send emails to their students? Are there overlaps?

Response: Email communications are currently distributed across multiple University departments and systems, and some overlap may occur. A goal of the CRM implementation is to improve coordination, visibility, segmentation, and consistency of student communications.

Q11 Section 5 Page 46 Omnichannel Communication Requirements

Question: How are you currently importing contact records into your email solution(s)?

Response: Contact records may originate from application platforms, web forms, events, recruitment sources, data files, and University systems. The proposed CRM should support automated integrations as well as secure file-based imports where appropriate.

Q12 Section 5 Page 46 Omnichannel Communication Requirements

Question: How do students currently opt-out of messaging from the institution? Is it separate for email versus SMS texting?

Response: Current opt-out processes may vary by communication channel and system. The proposed solution should support centralized and compliant consent, preference, suppression, and opt-out management for email and SMS communications.

Q13 Section 5 Page 46 Omnichannel Communication Requirements

Question: What event platform(s) are you currently using to engage with students? How are you tracking attendance?

Response: Event registration and attendance are currently managed through multiple processes and platforms. DSU seeks improved CRM-based event management, including registration, communications, attendance/check-in, and post-event follow-up.

Q14 Section 5 Page 46 Omnichannel Communication Requirements

Question: What SMS/MMS platform do you use? Are you communicating 1:1 with students via text?

Response: SMS capabilities currently vary across University systems. DSU seeks both compliant automated/bulk SMS messaging and individual two-way texting capabilities within or integrated with the proposed CRM.

Q15 Section 5Page 46Omnichannel Communication Requirements

Question: How are you currently logging call activity?

Response: Call activity is currently documented through varying departmental processes. The proposed CRM should support centralized call activity logging and tracking, with vendors identifying any available telephony integration capabilities.

Q16 Pricing

Question: Should pricing information only be included in the pricing proposal? Or can high-level pricing with more information be provided within the proposal response?

Response: Vendors should complete and submit all required pricing information in accordance with Attachment 6. Any pricing information included elsewhere in the proposal should be consistent with the official pricing submission and should not replace the required pricing documentation.

Q17 Section 8.1 Page 47Data Migration

Question: How many years of historical data does the institution seek to transfer?

Response: DSU generally anticipates migrating approximately 5–7 years of relevant historical data, subject to applicable retention requirements and final data-migration scope.

Q18 General

Question: What student populations are expected to be included in the initial implementation?

Response: The solution should ultimately support undergraduate, graduate, transfer, online, international, adult, and dual enrollment populations. Priority populations and sequencing will be finalized during implementation based on the approved implementation plan.

Q19 General

Question: Is a phased rollout approach acceptable?

Response: Yes. DSU will consider a phased rollout where the proposed approach supports University priorities, operational continuity, and the required implementation timeline.

Q20 General

Question: What is the desired go-live date?

Response: The target production go-live date is **March 1, 2027**.

Q21 General Vendor Activity

Question: Is the institution currently taking proposals for implementation services or solely from platform providers? For example, Technolutions Slate will likely respond but they do not provide implementation services.

Response: DSU is seeking a fully functional CRM solution inclusive of the implementation services necessary to meet the requirements of the RFP. Platform providers may propose with qualified implementation partners or subcontractors, provided the proposed structure complies with the RFP's prime contractor and subcontracting requirements.

Q22 General

Question: What SIS is currently in use?

Response: DSU currently utilizes Ellucian Banner 9, hosted on-premises. Ellucian Ethos is available as an API/integration layer.

Q23 General

Question: Which systems require data migration?

Response: Migration is expected to include relevant data from the University's existing CRM and other applicable enrollment-related systems and data sources. This may include prospect, inquiry, application, communication, event, activity, and case-management data. Final migration sources and scope will be determined during discovery.

Q24 General

Question: If Technolutions Slate is selected as the provider, is the institution looking to source one or two databases (segmenting admissions from current student)?

Response: DSU has not prescribed a one- or two-database architecture. If Slate is proposed, the vendor should recommend the architecture that best supports DSU's enterprise CRM requirements, student populations, data governance, security, integration, reporting, and long-term scalability.

Questions 16: Thursday 8/6/2026

1. Section number B.13 (Multi-Vendor Solutions (Joint Ventures)), Paragraph number 1, Page number 10, "Multi-vendor solutions (joint ventures) will be allowed only if one of the venture partners is designated as the 'prime contractor.'"

Question: If a prime vendor proposes a solution built on a third-party software platform (e.g., a cloud CRM platform), does the software publisher need to be listed as a subcontractor on Attachment 5? Or does this requirement apply only to firms providing direct services under the contract?

Response: Vendors should clearly disclose all proposed subcontractors and partner roles in accordance with the RFP. Final subcontracting requirements are subject to Procurement review.

2. Section number Attachment 6, Paragraph number 1, Page number 33, "The Vendor shall provide below a complete and detailed disclosure of all costs and fees... Any cost, fee, or charge not explicitly itemized and included in grand total below shall be deemed unauthorized."

Question: Should core platform subscription licensing costs (i.e., costs paid directly to the software publisher) be included in the vendor's grand total pricing, or should they be listed separately as pass-through costs? If included, does the University have a preference for how cooperative contract vehicles (e.g., Carahsoft or OMNIA) are utilized?

Response: All costs necessary to provide the proposed solution, including core platform subscription and software publisher licensing costs, should be reflected in the vendor's total proposed cost and clearly itemized. Any publisher, third-party, or pass-through costs should be separately identified to provide transparency into the total cost of ownership. Vendors may identify applicable cooperative contract vehicles, such as Carahsoft or OMNIA, where available; however, DSU does not require a specific cooperative contract vehicle unless otherwise stated in the RFP. Any proposed use of a cooperative contract is subject to University procurement requirements and approval.

3. Section number 1, Paragraph number 1, Page number 44, "Delaware State University seeks a comprehensive, scalable enterprise Customer Relationship Management (CRM) system solution to support admissions, recruitment, enrollment management, and student-facing customer service operations."

Question: Does the University currently use any CRM or enrollment management platform (e.g., Slate, TargetX, Salesforce, EAB Navigate, or a homegrown solution)? If so, will data migration from the existing system be required, and what is the approximate volume and format of historical records to be migrated?

Response: Migration is expected to include relevant prospect, application, event, communication, and case-management data from the current CRM and related systems. DSU generally retains approximately 5–7 years of applicable records; final scope, formats, volumes, cleansing, and validation requirements will be established during discovery.

4. Section number 3.1, Paragraph number 2, Page number 45, "The system must be configurable through administrative tools and should not require custom source-code development for standard workflow changes."

Question: The RFP states that the system should be configurable through administrative tools and should not require custom source-code development for standard workflow changes. Could Delaware State clarify the intent of this requirement? Specifically, is the expectation that routine business process and workflow changes after go-live be manageable through administrative configuration without developer involvement, or is this intended to prohibit custom-developed components as part of the overall implementation?

Response: The expectation is that routine workflow and business-process changes can be managed by authorized University administrators through native configuration tools without developer or vendor intervention. Custom-developed components are not prohibited where necessary; however, vendors should clearly identify any custom development and associated maintenance and support requirements.

5. Section number 3.2, Paragraph 1, Page number 45, "Centralized management of prospects, inquiries, applicants, and admitted students."

Question: To ensure accurate sizing for user licensing and scope, can the University confirm if the estimated full-time staff user count across admissions, recruitment, and enrollment management is approximately 30 users?

Response: Yes. For proposal and initial licensing purposes, vendors may assume approximately 30 full-time staff users across admissions, recruitment, enrollment management, administration, and related student-service functions. The solution should be scalable to accommodate additional users and roles as institutional needs evolve.

6. Section number 3.2, Paragraph number 1, Page number 45, "Lead capture from multiple sources, including web forms, events, and external data feeds."

Question: Could the University list the primary lead capture sources and third-party application platforms currently in use, such as the Common Application, GradCAS, or other Centralized Application Services (CAS)?

Response: Primary lead sources include University web forms, recruitment events, digital campaigns, prospect lists, partner organizations, and third-party application platforms. The CRM should support integration with applicable applications and lead sources through APIs, data feeds, or secure file imports. Specific platforms and integration requirements will be confirmed during implementation.

7. Section number 3.2, Paragraph number 1, Page number 45, "Application workflow management, including initiation, completion tracking, and checklist monitoring."

Question: Is the University seeking a CRM solution that includes a native application for admission to fully replace the existing CollegeNet platform, or should the proposed solution be configured to ingest data and operate in conjunction with CollegeNet?

Response: Applications will continue to originate from existing external application systems. The CRM should integrate with those systems and support application tracking, checklist monitoring, and enrollment workflows.

8. Section number 3.3, Paragraph number 1, Page number 45, "The solution must support enrollment planning and performance monitoring"

Question: What is the approximate annual volume of applicants processed by Delaware State University across all undergraduate, graduate, transfer, online, and international application types combined?

Response: DSU processes approximately 20,000–25,000+ applications annually across all student populations. Volumes vary by enrollment cycle and may increase based on recruitment and enrollment growth.

9. Section number 3.3, Paragraph number 1, Page number 45, "Behavioral triggers and automated outreach workflows."

Question: Approximately how many active automated communication journeys or drip campaigns does the University currently maintain, and how would you describe their general technical complexity?

Response: The number of active automated journeys varies by recruitment cycle and student population. Current campaigns range from basic scheduled/milestone communications to multi-step recruitment and enrollment sequences. Vendors should provide scalable, configurable journey capabilities; detailed campaign inventory and migration requirements will be addressed during implementation.

10. Section number 4.1, Paragraph number 1, Page number 46, "The Contractor shall provide bi-directional integration with the University's Student Information System (SIS)."

Question: What is the University's current Student Information System (SIS), including the vendor name and version? Does the University have an existing integration layer or middleware (e.g., MuleSoft, Boomi, or custom API), and will the vendor be expected to work within that architecture? Would you be open to vendor recommendations for integrations?

Response: DSU currently utilizes Ellucian Banner 9, hosted on-premises, with Ellucian Ethos available as an API/integration layer. Vendors should work within DSU's existing architecture where appropriate; however, DSU is open to vendor recommendations for additional integration approaches or middleware solutions.

11. Section number 4.1, Paragraph number 1, Page number 46, "Compliance with FERPA and institutional data governance policies."

Question: Are there specific institutional data governance rules, deduplication logic, or data quality standard requirements that the selected vendor must execute as part of the data migration phase?

Response: The selected vendor must comply with applicable DSU data governance, security, retention, and data-quality requirements. The vendor should support data profiling, cleansing, deduplication, validation, and reconciliation. Specific matching rules, authoritative data sources, and data-quality standards will be established collaboratively during discovery and data mapping.

12. Section number 4.2, Paragraph number 1, Page number 46, "The CRM shall integrate with the University's Learning Management System (LMS) to support pre-matriculation engagement activities."

Question: What Learning Management System (LMS) does the University currently use? Is the integration intended to be bi-directional, or read-only from the CRM's perspective? Are there specific LMS events or data points (e.g., login activity, course completion) that should trigger CRM workflows?

Response: Canvas is the University's current LMS. API-based integration is preferred where appropriate; specific data elements, triggers, and timing will be finalized during implementation.

13. Section number 4.3, Paragraph number 1, Page number 46, "Export or integration with institutional reporting and business intelligence tools."

Question: Which institutional reporting and business intelligence (BI) software platforms are currently utilized by Delaware State University? Should the vendor plan to use that tool or are you open to vendor recommendations?

Response: DSU currently utilizes institutional and system-based reporting tools. The CRM should provide robust native reporting and analytics capabilities and support integration with the University's reporting environment. DSU is open to vendor recommendations for BI and reporting solutions.

14. Section number 5, Paragraph number 1, Page number 46, "The CRM system must support or integrate with omnichannel communications, including Email campaigns and automated messaging, SMS/text messaging compliant with applicable regulations."

Question: Is the University seeking a CRM solution that includes native omnichannel communication capabilities, or will a third-party communications platform already in use at DSU need to be integrated? If a third-party platform is currently in use, please identify it.

Response: The proposed CRM should provide or integrate robust omnichannel enrollment communications. Vendors should identify native capabilities and any required third-party services.

15. Section number 5, Paragraph number 1, Page number 46, "Email campaigns and automated messaging."

Question: What is the approximate annual volume of outbound email communications transmitted across all enrollment and recruitment populations?

Response: Annual outbound email volume varies by recruitment cycle, population, and campaign. DSU anticipates approximately 10–15 marketing and 4–8 transactional email campaigns monthly. Vendors should provide scalable email capacity and clearly identify included volumes, usage thresholds, and any overage charges.

16. Section number 5, Paragraph number 1, Page number 46, "SMS/text messaging compliant with applicable regulations."

Question: What software platform or vendor service is Delaware State University currently using for institutional SMS communications?

Response: DSU currently utilizes multiple systems and departmental processes to support SMS communications. The proposed CRM should provide or integrate centralized SMS capabilities, including bulk and two-way messaging, consent/opt-out management, and communication tracking. 17. Section number 5, Paragraph number 1, Page number 46, "SMS/text messaging compliant with applicable regulations."

Question: For SMS/text messaging, is the University requiring two-way individual conversational messaging capabilities in addition to automated bulk/campaign SMS dispatching?

Response: The University is interested in both automated campaign SMS and individual two-way student messaging. Vendors should identify native or integrated capabilities and applicable usage costs.

18. Section number 5, Paragraph number 1, Page number 46, "Coordinated communications across channels to ensure a consistent institutional voice."

Question: Are communication channels currently managed centrally by a single team and technology platform, or are communication tools distributed across multiple academic departments and operating units?

Response: Communications may originate from multiple University units. The CRM should support coordinated communications, appropriate permissions, and a consistent institutional voice.

19. Section number 8.1, Paragraph number 1, Page number 47, "The Contractor shall provide:

- Project management and implementation planning.
- Requirements validation and configuration.
- System integration, testing, and deployment.
- Data migration support, where applicable.
- User Acceptance Testing (UAT) support."

Question: What is the University's anticipated go-live date or implementation timeline expectation, given the projected contract start of October 1, 2026? Will University IT and enrollment management staff be available to participate in requirements validation, UAT, and

testing activities during the implementation period?

Response: The target production go-live date is March 1, 2027. Appropriate University IT, Strategic Enrollment Management, and functional staff will participate in requirements validation, UAT, testing, and other implementation activities. Vendors should identify anticipated University resource requirements and dependencies in their proposed implementation plan.

20. Section number 8.1, Paragraph number 1, Page number 47, "Data migration support, where applicable."

Question: Could the University clarify the scope and approximate record volumes expected for data migration, including which specific entity types (e.g., historical prospects/inquiries, applicant records, historical communications, and event records) will be migrated to the new CRM?

Response: Migration is expected to include relevant prospect, application, event, communication, and case-management data from the current CRM and related systems. DSU generally retains approximately 5–7 years of applicable records; final scope, formats, volumes, cleansing, and validation requirements will be established during discovery.

21. Section number 8.1, Paragraph number 1, Page number 47, "Data migration support, where applicable."

Question: What are the current source systems, databases, or file formats where the historical data designated for migration presently resides?

Response: Migration is expected to include relevant prospect, application, event, communication, and case-management data from the current CRM and related systems. DSU generally retains approximately 5–7 years of applicable records; final scope, formats, volumes, cleansing, and validation requirements will be established during discovery.

22. Section number 8.2, Paragraph number 1, Page number 47, "Knowledge transfer to designated University staff. Post-implementation stabilization support."

Question: Does the University require on-site change management and role-based end-user training sessions prior to Go-Live, or does DSU prefer a hybrid/virtual training delivery model for staff and admissions counselors?

Response: DSU is open to in-person, virtual, and hybrid role-based training. A train-the-trainer component, administrator knowledge transfer, accessible materials, and appropriate documentation are preferred.

23. Section number 10, Paragraph number 1, Page number 48, "Proposals must address...system availability and uptime commitments."

Question: What minimum uptime SLA does the University require (e.g., 99.9%)? Does the University require a specific maintenance window policy or advance notice period for planned outages?

Response: Vendors should provide their standard enterprise SLA, including uptime, support hours, severity levels, response/resolution targets, escalation procedures, maintenance practices, and disaster-recovery commitments for evaluation by the University.

Questions 17: Thursday 8/6/2026

- Appendix B, Page 49-52
 - o **Question:** Appendix B: Cyber Responsibilities, Liability and Insurance is included as part of the RFP. Can you please confirm whether vendors are expected to respond to or complete any portion of this appendix, or if it is provided for informational purposes only?

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

Questions 18: Thursday 8/6/2026

Question 1

Section Number: Appendix A, Section 8.2 Training and Change Management, Paragraph Number: N/A, Page Number: 47, Text of Passage Being Questioned: "The Contractor shall provide: • Role-based training for functional users and administrators. • Training materials, documentation, and user guides. • Knowledge transfer to designated University staff. • Post-implementation stabilization support.",

Question: Please provide the estimated number of users, administrators, supervisors, enrollment counselors, admissions staff, and other stakeholder groups expected to utilize the CRM solution and require training and change management support during implementation and post-go-live adoption activities.

Response: DSU anticipates a minimum of approximately 30 internal CRM users at initial implementation, including system administrators, enrollment/recruitment staff, student-service users, supervisors, and reporting users. Additional stakeholders may participate in training and change-management activities as appropriate.

Question 2

Section Number: Appendix A, Section 1 Introduction and Background, Paragraph Number: N/A, Page Number: 44, Text of Passage Being Questioned: "Delaware State University seeks a comprehensive, scalable enterprise Customer Relationship Management (CRM) system solution to support admissions, recruitment, enrollment management, and student-facing customer service operations.",

Question: Please describe the current CRM, recruitment, communications, event, case management, reporting, and related systems in use by the University and indicate whether each will be replaced, retained or integrated. Please also describe the primary business process, user adoption, and operational challenges the University intends to address through this CRM implementation.

Response: DSU currently utilizes an admissions/enrollment CRM along with Banner, Canvas, and other University systems supporting communications, events, reporting, and student services. This procurement is intended to replace the current CRM while improving integration, workflow automation, data accessibility, communications, reporting, and overall user experience.

Question 3

Section Number: Appendix A, Section 3 Scope of Work, Paragraph Number: N/A, Page Number: 44, Text of Passage Being Questioned: "The Contractor shall provide all labor, software, implementation services, training, and support required to deliver a fully functional enterprise CRM system as described below."

Question: Which University departments, colleges, and stakeholder groups are anticipated to experience the most significant changes to business processes, job responsibilities, communications, or ways of working as a result of the CRM implementation?

Response: Strategic Enrollment Management units are expected to experience the most significant impact, particularly Admissions, Recruitment, Enrollment Marketing, and student-facing enrollment services. Other University stakeholders will participate where their processes or systems intersect with the CRM.

Question 4

Section Number: Appendix A, Section 3.1 CRM Functional Requirements, Paragraph Number: N/A, Page Number: 45, Text of Passage Being Questioned: "The proposed CRM solution must support end-to-end lifecycle management for multiple student populations, including undergraduate, graduate, transfer, online, international, adult, and dual enrollment students."

Question: Which student populations must be included at initial go-live, and which may be delivered in later phases?

Response: The solution should ultimately support undergraduate, graduate, transfer, online, international, adult, and dual enrollment populations. DSU will consider a phased implementation where appropriate, provided priority admissions and enrollment functions are supported at initial go-live.

Questions 19: Thursday 8/6/2026

1. Section number: Attachment 6, Paragraph number: 1, Page number: 33, Text of passage being questioned: "Software Licensing & Subscription... User Licenses",

Question: What is the anticipated total count of internal system users by role (e.g., System Administrators, Admissions Counselors, Student Service Representatives, Executive/Read-Only Users) that will require CRM access at go-live and full deployment?

Response: DSU anticipates a minimum of 30 internal users: approximately 5 system administrators, 15 full-access/recruitment users, and 10 limited-access or student-service users. Growth should be accommodated over the contract term.

2. Section number: Appendix A, Section 3.2, Paragraph number: 1, Page number: 45, Text of passage being questioned: "Centralized management of prospects, inquiries, applicants, and admitted students.",

Question: What CRM does DSU currently use, and what admissions, application,

inquiry-management, case-management, event-management, email, SMS, telephony, and reporting systems are currently in place? For each system, please indicate whether it will be replaced, retained and integrated, or used as a source for data migration.

Response: DSU is replacing its existing CRM. Consistent with University procurement procedures, the incumbent platform is not being disclosed. Relevant data from the existing system will be considered for migration.

3. Section number: Appendix A, Section 1, Paragraph number: 1, Page number: 44, Text of passage being questioned: "Delaware State University seeks a comprehensive, scalable enterprise Customer Relationship Management (CRM) system solution...",

Question: Does DSU have a preferred CRM platform, an existing enterprise licensing agreement, or any platform restrictions? Is Salesforce Education Cloud among the platforms DSU will consider if it satisfies all functional, technical, security, accessibility, and integration requirements in the RFP?

Response: The University has not identified a preferred CRM platform. Vendors should propose the solution that best satisfies the functional, technical, security, accessibility, and integration requirements of the RFP.

4. Section number: Appendix A, Section 3.1, Paragraph number: 1, Page number: 45, Text of passage being questioned: "The proposed CRM solution must support end-to-end lifecycle management for multiple student populations...",

Question: Please identify the business units and University stakeholder groups that will participate in requirements validation, design decisions, testing, approval, and ongoing governance for each student population. Please also identify the designated product owner or decision-making authority for prioritizing requirements and resolving cross-functional conflicts.

Response: Appropriate University functional, technical, security, and leadership representatives will participate throughout implementation. Specific roles, governance, and decision timelines will be finalized at project kickoff.

5. Section number: Appendix A, Section 3.2, Paragraph number: 2, Page number: 45, Text of passage being questioned: "Lead capture from multiple sources, including web forms, events, and external data feeds.",

Question: Please identify the web forms, application platforms, event systems, lead providers, data feeds, and other external sources that must create or update CRM records. Please provide available integration methods, expected transaction volumes, and whether real-time processing is required for each source.

Response: Lead sources include University web forms, events, application platforms, recruitment activities, and external data feeds. The detailed source inventory and integration methods will be validated during discovery.

6. Section number: Appendix A, Section 3.2, Paragraph number: 3, Page number: 45, Text of passage being questioned: "Application workflow management, including initiation, completion tracking, and checklist monitoring.",

Question: Is the selected CRM expected to serve as the system in which applicants complete and submit applications, or will application submission remain in an existing admissions or SIS platform? Please identify which system will be the system of record for applications, decisions, checklist items, deposits, and enrollment status.

Response: Applications will continue to originate from existing external application systems. The CRM should integrate with those systems and support application tracking, checklist monitoring, and enrollment workflows.

7. Section number: Appendix A, Section 3.3, Paragraph number: 1, Page number: 45, Text of passage being questioned: "Configurable enrollment funnels by student type and academic program.",

Question: Please provide current annual volumes for inquiries, prospects, applications started, applications completed, admits, deposits, and enrolled students, segmented where available by student population and term. Please also identify the historical-data period that must be migrated or made available for funnel, trend, and predictive analysis.

Response: DSU currently processes approximately 20,000–25,000+ applications annually. Volumes for inquiries/prospects, application starts, admits, deposits, and enrollments vary by population and term and will be reviewed during implementation. Vendors should anticipate approximately 5–7 years of relevant historical data, where available, to support migration, funnel/trend analysis, benchmarking, and predictive modeling.

8. Section number: Appendix A, Section 3.3, Paragraph number: 2-5, Page number: 45, Text of passage being questioned: "Behavioral triggers and automated outreach workflows... Tools to identify and mitigate enrollment melt... Real-time visibility into enrollment volume and pipeline progression.",

Question: Please identify the specific funnel stages, conversion definitions, enrollment-melt indicators, predictive use cases, KPIs, targets, and acceptance measures DSU will use to evaluate solution success. Please clarify whether the selected vendor is expected to establish baseline metrics and recommended targets during implementation.

Response: Funnel stages will generally include prospect/inquiry, application started, application completed, admitted, deposited/committed, and enrolled, with configurable variations by population and program. Key measures include conversion, application completion, yield, engagement, and enrollment melt. Predictive use cases may include likelihood to apply, complete an application, deposit/enroll, and melt risk. The selected vendor should work with DSU during implementation to establish baseline metrics, configure KPIs, and recommend appropriate targets and success measures.

9. Section number: Appendix A, Section 3.4, Paragraph number: 1-4, Page number: 45, Text of passage being questioned: "Centralized inquiry and case management for admissions and

enrollment services... Tracking response times, service resolution, and escalation rules.",

Question: Please identify the departments, queues, inquiry types, communication channels, service hours, current and projected annual case volumes, required escalation paths, and service-level targets that must be supported. Please also clarify whether case management is limited to admissions and enrollment services or is expected to expand to additional student-service units during the initial contract term.

Response: Initial use will focus on admissions and enrollment-related student services, with the ability to expand. Specific case types, queues, channels, escalation rules, service levels, and operating hours will be established during implementation.

9. Section number: Appendix A, Section 4.1, Paragraph number: 1-4, Page number: 46, Text of passage being questioned: "The Contractor shall provide bi-directional integration with the University's Student Information System (SIS)...",

Question: Please identify the current SIS product, version, hosting model, technical owner, available APIs or integration tools, authentication methods, data standards, and known integration constraints. Please also identify the required synchronization frequency and source-of-truth rules for each major data domain.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

10. Section number: Appendix A, Section 4.2, Paragraph number: 1-3, Page number: 46, Text of passage being questioned: "The CRM shall integrate with the University's Learning Management System (LMS)...",

Question: Please identify the current LMS product, version, hosting model, available APIs, integration tools, technical owner, and the specific LMS events or data elements that must trigger CRM communications or workflows. Please clarify whether this LMS integration is required for the initial go-live or may be delivered in a later phase.

Response: Canvas is the University's current LMS. API-based integration is preferred where appropriate; specific data elements, triggers, and timing will be finalized during implementation.

11. Section number: Appendix A, Sections 4.1 and 4.3, Paragraph number: 3-4 and 1-3, Page number: 46, Text of passage being questioned: "Real-time or near real-time data transfer using secure methods... Export or integration with institutional reporting and business intelligence tools.",

Question: Please identify DSU's current integration middleware, data warehouse, business intelligence, identity and access management, single sign-on, and master-data or data-governance technologies that the CRM must integrate with. Please also identify preferred integration patterns and whether DSU or the awarded vendor will own and operate middleware components after go-live.

Response: DSU does not currently utilize a single enterprise integration platform. Ellucian Ethos is available for Banner, and the University is open to vendor recommendations for additional integration

solutions.

13. Section number: Appendix A, Section 8.1, Paragraph number: 4, Page number: 47, Text of passage being questioned: "Data migration support, where applicable.",

Question: Please provide the estimated number of records, data sources, file formats, attachments or documents, historical years, duplicate rates, data-quality issues, and PII record count expected to be migrated. Please clarify which party will be responsible for data extraction, cleansing, deduplication, transformation, validation, and final migration approval.

Response: Migration is expected to include relevant prospect, application, event, communication, and case-management data from the current CRM and related systems. DSU generally retains approximately 5–7 years of applicable records; final scope, formats, volumes, cleansing, and validation requirements will be established during discovery.

14. Section number: Appendix A, Section 5, Paragraph number: 1-5, Page number: 46, Text of passage being questioned: "The CRM system must support or integrate with omnichannel communications, including email campaigns, SMS/text messaging, call activity logging, event marketing, and coordinated communications across channels.",

Question: Please provide anticipated annual and peak monthly volumes for email, SMS, calls, event registrations, and other communications. Please identify any existing email, SMS, telephony, event, consent-management, short-code, or preference-center platforms that must be retained or integrated, and clarify whether related usage charges must be included in the fixed pricing.

Response: Communication volumes vary by recruitment cycle and student population. DSU anticipates approximately 10–15 marketing email campaigns, 4–8 transactional email campaigns, and 10–15 SMS campaigns monthly, with actual message, call, and event volumes varying throughout the year. The CRM should support or integrate email, SMS, call activity, event management, and consent/preference management. Vendors should clearly identify included usage allowances and separately disclose all usage-based, overage, third-party, short-code, carrier, or other recurring charges.

15. Section number: Appendix A, Section 8.1, Paragraph number: 1-5, Page number: 47, Text of passage being questioned: "The Contractor shall provide project management and implementation planning, requirements validation and configuration, system integration, testing, and deployment, data migration support, where applicable, and User Acceptance Testing (UAT) support.",

Question: Please provide DSU's desired implementation phases, required milestone dates, target production go-live date, blackout periods, academic-calendar constraints, and acceptance criteria. Please clarify whether the projected October 1, 2026 contract start date is firm and whether DSU expects a phased deployment by population, function, or campus.

Response: The projected contract start date is October 1, 2026, subject to completion of procurement

and contracting, with a target production go-live of March 1, 2027. DSU is open to a phased implementation by population and/or function where appropriate. Vendors should propose implementation phases and milestones that account for academic and enrollment cycles, testing/UAT, training, deployment, and stabilization. Final milestone dates, blackout periods, and acceptance criteria will be established with the selected vendor during project initiation.

16. Section number: Appendix A, Section 8.1, Paragraph number: 1, Page number: 47, Text of passage being questioned: "Project management and implementation planning.",
Question: What project methodology and governance cadence does DSU prefer, and what participation can vendors expect from the University's product owner, technical lead, functional leads, data owners, security team, and executive sponsor? Please identify expectations for status meetings, backlog prioritization, design approvals, sprint or phase reviews, issue escalation, and scope-change control.

Response: Vendors should propose a proven higher-education implementation methodology, governance structure, meeting cadence, status reporting approach, and change-control process.

17. Section number: Appendix A, Section 8.1, Paragraph number: 3 and 5, Page number: 47, Text of passage being questioned: "System integration, testing, and deployment... User Acceptance Testing (UAT) support.",

Question: Please describe DSU's expected quality-assurance and UAT approach, including responsible University participants, test environments, test-data requirements, accessibility testing, security testing, integration testing, performance testing, defect-severity definitions, entry and exit criteria, and the authority responsible for final acceptance.

Response: Vendors should propose a solution and approach that satisfies the RFP requirements. Detailed operational and technical requirements will be validated with the awarded vendor during discovery and implementation.

19. Section number: Appendix A, Section 8.2, Paragraph number: 1-4, Page number: 47, Text of passage being questioned: "Role-based training for functional users and administrators... Post-implementation stabilization support.",

Question: Please identify the user groups, estimated number of learners, preferred delivery methods, locations, training environments, required number of sessions, train-the-trainer expectations, accessibility requirements, recording requirements, and documentation formats. Please also state the desired duration and coverage hours for post-implementation stabilization support.

Response: DSU anticipates approximately 30 initial CRM users across administrative, admissions/recruitment, enrollment, reporting, and student-service roles. Training may be delivered virtually, in person, or through a hybrid approach and should include role-based training, administrator training, train-the-trainer/knowledge transfer, accessible electronic documentation, recorded sessions where appropriate, and a training/sandbox environment. Vendors should recommend the appropriate

number of sessions and propose a post-go-live stabilization period, including duration, coverage hours, staffing, and transition to ongoing support.

20. Section number: Appendix A, Section 10, Paragraph number: 1-4, Page number: 48, Text of passage being questioned: "Ongoing technical support offerings... System availability and uptime commitments... Product update and enhancement cadence... Issue escalation procedures.",

Question: Please specify the required production uptime, support hours, severity levels, initial-response and resolution targets, planned-maintenance windows, service-credit expectations, escalation requirements, and disaster-recovery objectives, including recovery time objective and recovery point objective. Please also clarify whether 24x7 support is required for critical incidents.

Response: Vendors should provide their standard enterprise SLA, including uptime, support hours, severity levels, response/resolution targets, escalation procedures, maintenance practices, and disaster-recovery commitments for evaluation by the University.

20. Section number: Appendix A, Sections 6 and 10, Paragraph number: 1-3 and 1-4, Page number: 46-48, Text of passage being questioned: "Configure workflows, alerts, and business rules without vendor intervention... Product update and enhancement cadence.",

Question: After go-live, how does DSU intend to govern user feedback, enhancement requests, release planning, and configuration changes? Please clarify which changes DSU expects its administrators to perform independently and which changes should be included in vendor support, managed services, or separately priced enhancement work.

Response: Vendors should clearly describe and separately price any ongoing administration, managed services, enhancement capacity, release support, and integration monitoring proposed for the contract term.

21. Section number: Appendix A, Section 7, Paragraph number: 1, Page number: 47, Text of passage being questioned: "The Contractor must demonstrate compliance with FERPA and applicable state and federal data protection laws, role-based access control and audit logging, data encryption at rest and in transit, accessibility standards at or above WCAG 2.1 AA, and public-sector cybersecurity and risk management requirements.",

Question: Please identify or provide links to the specific Delaware Department of Technology and Information security standards and accessibility requirements that apply to this project. Please also identify any required security questionnaires, cloud-hosting or U.S. data-residency restrictions, architecture or security reviews, audit reports or certifications, penetration-testing documentation, and accessibility-conformance documentation that vendors must provide during the proposal, implementation, or production approval process.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

22. Section number: Appendix B, Section C, Paragraph number: 1 and 1.1-1.4.4, Page number: 50-51, Text of passage being questioned: "Vendor shall notify State of Delaware, Department of Technology and Information (DTI) and Government Support Services (including UNIVERSITY) without unreasonable delay when the vendor confirms a data breach.",

Question: Please provide the estimated number of PII records that the selected solution will store or process and confirm the minimum cyber-liability insurance limits DSU requires for this contract. Please also clarify whether the liability and vendor-funded breach-response provisions in Appendix B are negotiable during contract discussions.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

23. Section number: Attachment 6, Paragraph number: 1, Page number: 33-35, Text of passage being questioned: "Please clarify in detail all costs/fees that will be charged to the University...",

Question: Should vendors price a three-year base term plus two one-year options only, or should vendors also submit a separate five-year contract alternative? Please confirm the assumptions DSU expects vendors to use for user counts, record volumes, email and SMS consumption, storage, environments, integrations, and annual growth when completing Attachment 6.

Response: Vendors should price the three-year base term plus two optional one-year extensions as outlined in the RFP; a separate five-year alternative is not required. For pricing purposes, assume approximately 30 internal users and 20,000–25,000+ applications annually, with scalable messaging, storage, environments, integrations, and record capacity. All usage assumptions, annual increases, overage charges, and additional costs should be clearly identified.

24. Section number: I. Overview/Introduction and Appendix A, Section 8.1, Paragraph number: Schedule of Events and Paragraph 1, Page number: 4 and 47, Text of passage being questioned: "Projected Contract Start Date October 01, 2026... Project management and implementation planning.",

Question: Because the contractor-selection date is listed as TBD, please clarify whether October 1, 2026 is the anticipated contract-execution date, notice-to-proceed date, or required commencement of implementation services. If selection or negotiations extend beyond that date, will DSU revise the project start and subsequent implementation milestones?

Response: October 1, 2026 is the projected contract start date and is subject to completion of the procurement and contracting process. Subsequent milestones may be adjusted as necessary.

Questions 20: Thursday 8/6/2026

1. Section number Appendix A, Section 3.1, Paragraph number 1, Page number 45, Text of passage being questioned "The proposed CRM solution must support end-to-end lifecycle management for multiple student populations, including

undergraduate, graduate, transfer, online, international, adult, and dual enrollment students.”

Question: Please confirm the current and expected annual volume for each student population, including prospects, inquiries, applicants, admitted students, deposited students, and enrolled students, so that licensing, configuration, migration, integration, and support estimates can be sized accurately.

Response: Vendors should use the population and application-volume estimates already provided in this Addendum for sizing. Volumes are estimates and may fluctuate by term and recruitment cycle.

2. Section number Appendix A, Section 3.2, Paragraph number 1, Page number 45, Text of passage being questioned “Lead capture from multiple sources, including web forms, events, and external data feeds.”

Question: Please provide the list and number of current and expected lead sources, including website forms, application portals, college fairs, social campaigns, partner feeds, international agents, and third-party recruitment platforms, along with expected data volumes and file/API formats.

Response: Lead sources include University web forms, events, application platforms, recruitment activities, and external data feeds. The detailed source inventory and integration methods will be validated during discovery.

3. Section number Appendix A, Section 3.2, Paragraph number 1, Page number 45, Text of passage being questioned “Application workflow management, including initiation, completion tracking, and checklist monitoring.”

Question: Can you list the variance of workflow used across all the student population (e.g. Program specific admission process etc.) Please provide the number of variants with approval process complexity.

Response: Workflow requirements vary by student population, program, and term. Vendors should propose a configurable solution and validate the detailed workflow inventory during discovery.

4. Appendix A, Section 1, Paragraph 1, Page number 44, Text of passage questioned “ Delaware State University seeks a comprehensive, scalable enterprise Customer Relationship Management (CRM) system solution to support admissions, recruitment, enrollment management, and student-facing customer service operations.”

Question: Please confirm the current CRM or student engagement platform in use at DSU, and whether migration from or decommissioning of the existing system is included in this project's scope.

Response: DSU is replacing its existing CRM. Consistent with University procurement procedures, the incumbent platform is not being disclosed. Relevant data from the existing system will be considered for migration.

5. Section number Appendix A, Section 3.2, Paragraph number 1, Page number 45, Text of passage being questioned “Admissions counselor assignment, caseload tracking, and activity logging.”

Question: Is there a counselor assignment rule required to be configured – automatically based on geography/ student type /academic program/ territory/campaign source etc. or it's a manual assignment?

Response: The solution should support both manual and automated counselor assignment using configurable criteria such as geography, student population, program, territory, source, and workload.

6. Section number Appendix A, Section 3.2, Paragraph number 1, Page number 45, Text of passage being questioned “Support for population-specific and term-based recruitment cycles.”

Question: Please confirm the number of academic terms, intake cycles,

recruitment calendars, and rolling admission cycles to be supported annually, including whether future-dated cycles must be supported.

Response: The CRM should support Fall, Spring, and Summer terms, multiple recruitment/intake cycles, and rolling admissions where applicable. The solution must accommodate population- and program-specific calendars and support future-dated cycles.

7. Section number Appendix A, Section 3.3, Paragraph number 1, Page number 45, Text of passage being questioned *“Configurable enrollment funnels by student type and academic program.”*

Question: Please provide the expected funnel stages by student type and program and confirm whether historical funnel performance should be migrated for trend analysis and benchmarking.

Response: Funnel stages will generally include prospect/inquiry, application started, application completed, admitted, deposited/committed, and enrolled, with configurable variations by population and program. Relevant historical funnel data should be migrated, where available, to support trend analysis and benchmarking.

8. Section number Appendix A, Section 4.1, Paragraph number 1, Page number 46, Text of passage being questioned *“The Contractor shall provide bi-directional integration with the University’s Student Information System (SIS).”*

Question: Please confirm the current SIS platform name, version, hosting model, integration capabilities, API availability, middleware, and access to SIS technical documentation will be provided during discovery.

Response: DSU currently uses Ellucian Banner 9 on-premises. Ellucian Ethos is available as an API layer, and vendors may recommend additional appropriate integration approaches.

9. Section number Appendix A, Section 4.2, Paragraph number 1, Page number 46, Text of passage being questioned *“The CRM shall integrate with the University’s Learning Management System (LMS).”*

Question: Please confirm the current LMS platform name, version, integration method, required LMS data points that the CRM requires to receive, and whether the LMS integration is required for go-live or can be delivered in a later phase.

Response: Canvas is the University’s current LMS. API-based integration is preferred where appropriate; specific data elements, triggers, and timing will be finalized during implementation.

10. Section number Appendix A, Section 4.3, Paragraph number 1, Page number 46, Text of passage being questioned *“Export or integration with institutional reporting and business intelligence tools.”*

Question: Please confirm the University’s current BI/reporting tools, data warehouse environment, preferred export mechanisms, reporting frequency, and whether a governed reporting data model is expected as part of the scope.

Response: DSU currently utilizes internal reporting systems. The University expects robust native CRM reporting and analytics capabilities with appropriate export and integration functionality.

11. Section number Appendix A, Section 5, Paragraph number 1, Page number 46, Text of passage being questioned *“The CRM system must support or integrate with omnichannel communications, including email campaigns and automated messaging.”*

Question: Please confirm whether the University expects the CRM to use native email capabilities, integrate with an existing email and or automated messaging marketing platform, or support both. What is the current automated messaging platform?

Response: The proposed CRM should provide or integrate robust omnichannel enrollment

communications. Vendors should identify native capabilities and any required third-party services.

**12. Section number Appendix A, Section 5, Paragraph number 1, Page number 46,
Text of passage being questioned “SMS/text messaging compliant with applicable regulations.”**

Question: Please clarify expected SMS volumes, countries of delivery, opt-in/opt-out processes, compliance expectations, and whether SMS costs should be included in the base pricing or shown as usage-based charges.

Response: SMS volumes will vary by campaign and student population, with messaging primarily to U.S.-based recipients. The solution must support compliant opt-in/opt-out and preference management. Vendors should clearly identify included SMS volumes and separately disclose any usage-based or overage charges.

**13. Section number Appendix A, Section 5, Paragraph number 1, Page number 46,
Text of passage being questioned “Event marketing and attendance tracking.”**

Question: Can you elaborate on how event marketing and attendance tracking is done today? Does it include QR check-in, waitlists, capacity management, or payment collection etc.

Response: Event management is currently handled through multiple platforms and processes. DSU seeks enhanced capabilities for event registration, communications, attendance/check-in, capacity management, waitlists, and post-event follow-up; vendors should identify available functionality, including QR check-in and payment collection where applicable.

**14. Section number Appendix A, Section 7, Paragraph number 1, Page number 47,
Text of passage being questioned “FERPA and applicable state and federal data protection laws.”**

Question: What documentation would DSU accept to demonstrate FERPA compliance?

Response: Vendors must demonstrate compliance with FERPA and applicable state and federal data-protection requirements and provide supporting documentation appropriate to the proposed solution.

**15. Section number Appendix A, Section 7, Paragraph number 1, Page number 47,
Text of passage being questioned “Data encryption at rest and in transit.”**

Question: Please confirm whether the University has mandated encryption standards, key management requirements, data residency expectations, and whether University-managed keys are required or preferred.

Response: The University’s Procurement and/or Legal team will provide clarification regarding this contractual requirement.

**16. Section number Appendix A, Section 7, Paragraph number 1, Page number 47,
Text of passage being questioned “Accessibility standards at or above WCAG 2.1 AA.”**

Question: What documentation would DSU accept to demonstrate WCAG 2.1 AA conformance, for example, a VPAT (Voluntary Product Accessibility Template), or a different format?

Response: The University’s Procurement and/or Legal team will provide clarification regarding this contractual requirement.

**17. Section number Appendix A, Section 8.1, Paragraph number 1, Page number 47,
Text of passage being questioned “Data migration support, where applicable.”**

Question: Please identify the legacy systems, data sources, record counts, entities, file formats.

Response: Migration is expected to include relevant prospect, application, event, communication, and

case-management data from the current CRM and related systems. DSU generally retains approximately 5–7 years of applicable records; final scope, formats, volumes, cleansing, and validation requirements will be established during discovery.

18. Section number Appendix A, Section 8.1, Paragraph number 1, Page number 47, Text of passage being questioned “System integration, testing, and deployment.”

Question: Please confirm the required number of environments, such as development, test, UAT, training, staging, and production, and whether sandbox environments must remain available post go-live.

Response: Vendors should propose the appropriate number and type of environments necessary for implementation, testing, training, and production. The proposal should identify any environments that will remain available post-go-live and all associated costs.

19. Section number Appendix A, Section 10, Paragraph number 1, Page number 48, Text of passage being questioned “Ongoing technical support offerings.”

Question: Please clarify the required support hours, time zone coverage, support channels, incident priorities, target response times, resolution times, escalation matrix, and whether 24x7 support is required. Is there an ITSM tool being used by the university for support incident management?

Response: Vendors should provide their standard enterprise SLA, including uptime, support hours, severity levels, response/resolution targets, escalation procedures, maintenance practices, and disaster-recovery commitments for evaluation by the University.

20. Section number Attachment 6, Pricing Sheet, Paragraph number Software Licensing & Subscription, Page number 33, Text of passage being questioned “User Licenses.”

Question: Please provide the expected number of users by role, such as named, concurrent, administrative, read-only, executive, integration, and external/portal users for Year 1 through Year 5.

Response: DSU anticipates a minimum of 30 internal users: approximately 5 system administrators, 15 full-access/recruitment users, and 10 limited-access or student-service users. Growth should be accommodated over the contract term.

21. Section number Attachment 6, Pricing Sheet, Paragraph number Hosting / Storage, Page number 33, Text of passage being questioned “Hosting / Storage.”

Question: Please confirm the expected storage volume, document attachment volume, retention policy, archival requirements, and annual growth assumptions for CRM records and files.

Response: DSU generally retains applicable records for approximately 5–7 years. Detailed retention, archival, legal-hold, purge, and deletion requirements will be finalized with the awarded vendor.

22. Section number Attachment 6, Pricing Sheet, Paragraph number Implementation & Configuration, Page number 33, Text of passage being questioned “Implementation & Configuration (Year 1 Only).”

Question: Please confirm whether all implementation activities must be completed in Year 1 and whether the University has a target go-live date, phased rollout preference, blackout periods, or critical enrollment cycle deadlines.

Response: The target production go-live date is March 1, 2027. Implementation, testing, and staff training should be completed in sufficient time to support this date.

23. Section number Attachment 6, Pricing Sheet, Paragraph number Optional / Value-Added Services, Page number 34, Text of passage being questioned

“Advanced Analytics, AI Engagement Tools, Additional Integrations, Custom Enhancements.”

Question: Please clarify which optional services, if any, should be treated as mandatory for the proposal baseline and which should be priced separately as optional services.

Response: The core functional, technical, integration, reporting, communication, security, implementation, training, and support requirements identified in the RFP should be included in the proposal baseline. Advanced analytics, AI engagement tools, additional integrations beyond the required scope, custom enhancements, and other value-added capabilities should be separately identified and priced as optional services unless required elsewhere in the RFP.

24. Section number IV.D.5.n, Vendor Activity, Paragraph number n, Page number 22, Text of passage being questioned *“No activity is to be executed in an offshore facility, either by a subcontracted firm or a foreign office or division of the vendor.”*

Question: The RFP says no activity can take place outside the U.S., including through a foreign office, division, or subcontractor. Please clarify whether this restriction applies to all project activities, and covers every aspect of the vendor's business, or only work involving DSU's data hosting, solution design, configuration, development, integration, testing, data migration, support, monitoring etc. or only for the activities in production environment? Would U.S. based data hosting, implementation and support satisfy the requirement, even if the vendor has foreign offices performing unrelated functions?

Response: Vendors should clearly disclose all proposed subcontractors and partner roles in accordance with the RFP. Final subcontracting requirements are subject to Procurement review.

25. Section number IV.B.13 and IV.B.14, Multi-Vendor Solutions and Sub-Contracting, Paragraph number b, Page number 10 and 11, Text of passage being questioned *“Use of subcontractors must be clearly explained in the proposal, and major subcontractors must be identified by name... Any subcontractors must be approved by Delaware State University.”*

Question: The product vendors (OEM) will be involved in the implementation in the capacity of subcontractors; do we need to confirm their involvement too in the response. Can one vendor serve as the prime contractor and another serve as a disclosed and approved software subcontractor, without forming a separate legal joint venture, as long as their roles are clearly identified and the required subcontractor information is provided?

Response: Vendors should clearly disclose all proposed subcontractors and partner roles in accordance with the RFP. Final subcontracting requirements are subject to Procurement review.

26. Section number IV.D.5.h, Warranty, Paragraph number h, Page number 21, Text of passage being questioned *“The Vendor will provide a warranty that the deliverables provided pursuant to the contract will function as designed for a period of no less than the term of initial contract.”*

Question: Please clarify whether the warranty applies to implementation deliverables only or also to vendor product functionality, third-party integrations, custom configurations, data migration outputs, and reporting deliverables.

Response: The University's Procurement and/or Legal team will provide clarification regarding this contractual requirement.

27. Section V, Proposal Evaluation Team, Paragraph 1, Page number 13 Text of passage being questioned *“The Proposal Evaluation Team shall be comprised of representatives of the Delaware State University.”*

Question: Please confirm the composition of the Proposal Evaluation Team, including the functional areas represented (e.g., IT, Admissions, Finance, Legal), so

that vendors can tailor their proposals to the full range of evaluator priorities

Response: The Proposal Evaluation Team will consist of appropriate University representatives with relevant functional and technical expertise. Vendors should prepare proposals that comprehensively address all requirements and evaluation criteria outlined in the RFP rather than tailoring responses to individual evaluators or functional areas.

28. Section number I, Schedule of Events, Paragraph number Schedule of Events, Page number 4, Text of passage being questioned "Deadline to Receive Questions August 05, 2026, at 10:00 AM, Responses to Questions Posted by September 02, 2026, Bid Opening September 09, 2026, at 3:00 PM."

Question: Given the compressed window between the posting of Q&A responses (September 2) and the proposal due date (September 9), will the University consider extending the proposal due date, by three weeks to September 30, 2026, to allow adequate time to incorporate clarifications into their proposals? Answer to this question will have a significant impact on the solution and pricing.

Response: Vendors should propose a solution and approach that satisfies the RFP requirements.

Questions 21: Thursday 8/6/2026

Questions 1

Section Number: 8 Paragraph Number: III.A Page Number: 5

Text of Passage Being Questioned: "Provide Delaware license(s) and/or certification(s) necessary to perform services as identified in the scope of work."

Question: Please clarify whether the required Delaware business license(s) and/or certification(s) must be obtained and submitted at the time of proposal submission or whether they may be obtained after contract award. If the license(s) can be obtained after award, please specify the timeframe within which the successful vendor must secure and provide the required Delaware business license(s) and/or certification(s).

Response: The successful vendor must obtain and provide all required Delaware business licenses and/or certifications prior to contract execution or commencement of services.