



# UMUC

DATE: May 23, 2017

TO: All Prospective Proposers

FROM: Amy Kisloski  
Director, Technology Procurement  
301-985-7707

Alicia Klein  
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RE: Solicitation # 91513 – Mobile Marketing Services: Short Codes and Short Message Services (“SMS”) Addendum #1 dated 5/23/2017

The following amends the above-referenced Solicitation documents. Receipt of this addendum is to be acknowledged by completing the enclosed "Acknowledgement of Receipt of Addenda Form" and including it in the Proposal.

A. RFP 91513: Section I. General Information, Paragraph 1. Summary, subparagraph 1.1., Modification.

Sentence two (2) in this paragraph is hereby deleted and replaced in its entirety with the following:

“The selected firm will work with the Office of Strategic Enrollment Management to achieve UMUC’s goal to reach prospective students, current students, and alumni on their mobile phones using short message services (“SMS”) and short codes.”

B. Questions from Potential Proposing Firms:

1. *“Does UMUC have an existing SMS messaging program? If so, what are the program details – opt-in database size, messaging frequency (e.g. number of messages sent per month), number of short codes, etc.. If not, does UMUC have any prior SMS messaging experience?”*

**UMUC Response**

UMUC does not have an existing program or any prior messaging experience.

2. *“Would you [UMUC] elaborate on the purpose for issuing this RFP? Is there a specific objective UMUC is trying to solve, or a challenge UMUC is trying to overcome by implementing an SMS program?”*

**UMUC Response**

Pursuant to paragraph 1 in Section I. “General Information” (p. 4) of the solicitation documents, UMUC’s goal is to reach prospective students, current students, and alumni on their mobile phones using short message services (“SMS”) and short codes. Overall, UMUC wants to have better communication with our student audiences.

3. *“Will there be departments other than marketing that will work on the SMS program? If so, what are these departments? How many potential internal touchpoints does UMUC expect to need with the selected vendor?”*

**UMUC Response**

Per the correction set forth in this Addendum, the Office of Strategic Enrollment Management is the ordering office responsible for the SMS program. All student facing departments (i.e. Admissions, Advising, Financial Aid, Student Accounts, Faculty, etc.) will be able to text once the SMS program is complete.

4. *“What are the most critical decision-making criteria, in order of importance, for UMUC when selecting a vendor?”*

**UMUC Response**

The Initial Technical Criteria in Article 1, §2, [items 2.1 through 2.8] of the solicitation document are listed in order of importance.

In accordance with §2.1 in Section III. Article 2. “Technical Evaluation Process” of the solicitation document (p. 13), the Evaluation and Selection Committee shall conduct its evaluation of the technical merit of the Proposals in accordance with the Evaluation Criteria listed in Article 1, §2, [of the solicitation documents]. The decision for progressing in the procurement process will be made based on the strengths, weaknesses, advantages, and deficiencies that the Technical Proposals represent.

5. *“Would you [UMUC] elaborate on what comprises the “technical merit” criteria?”*

**UMUC Response**

Please see §2 in Section III. Article 1. “Technical Proposal Requirements” of the solicitation document (p. 9) for the Initial Technical Criteria.

6. *“How does UMUC envision using SMS messaging to interact with its constituents in each of the following categories?:*

- a. *Students*
- b. *Prospective Students*
- c. *Alumni*

**UMUC Response**

- a. Students: All relevant student communications including but not limited to: events, class info, links to portal fields, answering questions, etc..
- b. Prospective Students: Same as Students.
- c. Alumni: Elevate the alumni connection to their alma mater by giving them information, engagements, activities and alerts when most valuable to their needs. This could include links to alumni news, new alumni benefits and event reminders to name a few. Also, increase staff efficiency through pre-scheduled, triggered and customized messages.

Everything above should include the ability to send 1:1 messages, broadcast messages, and messages with images, photos. etc.

7. *“Regarding targeting, segmentation and personalization, what demographic information does UMUC use to target communication currently, if any?”*

**UMUC Response**

UMUC has persona, segments, channels, and programmatic.

8. *“What type of data is UMUC collecting?”*

**UMUC Response**

Opt-out rates, response rates, frequency by student.

9. *“How does UMUC define the success of the mobile program? What are your KPIs for SMS/mobile messaging?”*

**UMUC Response**

This is yet to be defined but initially, student engagement with UMUC - answering call-to-actions, reduced phone calls.

10. *“Does UMUC have interest in services beyond account management and technical support, such as strategic services?”*

**UMUC Response**

Strategic services are out of scope for this RFP.

11. *“Are international messaging programs expected to differ materially than domestic programs?”*

**UMUC Response**

No.

12. *“What countries in Asia and Europe are desired? What is the expectation for rollout of this program?”*

**UMUC Response**

Please see this link for a list of locations: <http://www.umuc.edu/locations/index.cfm>

13. *“Who/What department will manage international programs?”*

**UMUC Response**

UMUC’s Office of Military Operations.

14. *“Is Salesforce the only third-party integration requirement? If so, what is the intention for the desired integration?”*

**UMUC Response**

UMUC will text from Salesforce directly and measure all texts. All text records will be stored here.

15. *“Based on the user experience and scope desired, is there an existing data model used by UMUC that will be incorporated in the program?”*

- a. *What data exchange and synchronization is required by UMUC (nightly, weekly, monthly, etc.)?*

**UMUC Response**

There is no formal data model. UMUC plans to build campaigns and simply upload them for messaging. If a prospective proposer has a preferred data model, please include information about it in the Technical Proposal.

16. *“What protocols and timing are required for server communications between UMUC/Salesforce and the selected vendor?”*

- a. *Can UMUC support real-time API calls and synchronization?*
- b. *What cadence/schedule of automated reports are required?*
- c. *How is data synchronization (mobile number, opt-in/out, demographic information captured or used) managed and expected by UMUC?*

**UMUC Response**

- a. Yes, UMUC can support real-time API calls and synchronization.
- b. Ad-hoc and nightly.

c. UMUC will cleanse campaigns using our “DO NOT CALL” lists; mobile numbers will be those currently available in our Student Information System and updated by students or staff. “Opt In” is an option on our inquiry form, though we may provide additional options. “Opt-Out information will be provided to the awarded vendor.

17. *“What is the goal of the campaign?”*

**UMUC Response**

Pursuant to paragraph 1 of Section II. Scope of Work (p. 4) of the solicitation document, UMUC is seeking a firm with mobile Short Message Service (“SMS”) messaging and short code provisioning capability to assist UMUC in its objective to reach students, prospective students and alumni on mobile phones using SMS marketing techniques. Overall, UMUC wants to improve student communication and engagement.

18. *“What is the length, time frame and target audience of the campaign?”*

**UMUC Response**

UMUC expects a mobile messaging program that is ongoing.

**ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA FORM**

**Solicitation:** UMUC Solicitation #91513 – Mobile Marketing Services: Short Codes and Short Messaging Services (“SMS”)

**TECHNICAL PROPOSAL DUE DATE:** Thursday, June 1, 2017 at 2:00 PM ET

**NAME OF PROPOSER:** \_\_\_\_\_

**ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA**

The undersigned, hereby acknowledges the receipt of the following addenda:

Addendum No. <u>  1  </u>	dated <u>  5/23/17  </u>
Addendum No. <u>          </u>	dated <u>                  </u>
Addendum No. <u>          </u>	dated <u>                  </u>
Addendum No. <u>          </u>	dated <u>                  </u>
Addendum No. <u>          </u>	dated <u>                  </u>

As stated in the solicitation documents, this form is included in our Technical Proposal.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name Printed

\_\_\_\_\_  
Title