

Sarah Jones  
(660) 785-4159  
FAX: (660) 785-7337



McClain Hall 106  
100 E Normal  
Kirksville, MO 63501-4221

TO: ALL PROSPECTIVE VENDORS

RE: Addendum No. 1  
Customer Relationship Management System Services  
Project No. SP26-03

Addendum No. 1 is issued to inform vendors that we have received questions that require a response, and therefore, an addendum. Please refer to the questions and responses provided.

Please confirm that we have the correct email address for your company. This addendum and subsequent addendums will be sent to all firms who have expressed their interest in submitting a proposal.

Vendors are to acknowledge receipt of Addendum No. 1 in their response.

If you have further questions, please contact me at [sjones@truman.edu](mailto:sjones@truman.edu). Thank you.

Sincerely,

A handwritten signature in cursive script that reads "Sarah Jones".

Sarah Jones  
Purchasing Buyer

## Project No. SP26-03 Customer Relationship Management System Services

### Questions for Customer Relationship Management System Services:

1. In several places, your RFP indicates a preference for building any updates/enhancements in the Slate TEST environment before moving those enhancements to the PRODUCTION Slate environment. As you likely know, while you can easily ‘refresh’ the Slate TEST environment to copy the current PRODUCTION environment into TEST, there is not an easy and foolproof way to move complex builds from TEST into PRODUCTION without completely rebuilding the enhancement. This can significantly add build and testing time to any enhancement build. In addition, the RFP indicates a very short timeframe of a maximum of 5 months (from July 1, 2026 through November 1, 2026) to investigate, build, test, train, and launch on any new enhancements. Given the short timeframe and the potentially significant additional time your preferred approach would add to the project, would you be flexible on a process where any large and complex builds would be created within the PRODUCTION environment first before being copied into the TEST environment with frequent TEST environment refreshes?
  - A. Our current plan is to utilize the Clean Slate processes that come with the system. We may be open to discussing the option discussed above. We are seeking consulting services to advise us on best practices and operation of Slate. We expect to make these determinations as part of the partnership with the selected vendor’s expert advice.
2. The RFP indicates an interest in migrating three years of data. Does this suggest that you will be obtaining a brand new “clean” PRODUCTION Slate instance that you will be moving into after the enhancements and data migration are complete? If not, where is the data being moved from and to, and what is the purpose of this data migration?
  - A. We are still determining our plan. Part of the purpose of this RFP is seeking consulting services knowledgeable about options such as these.
3. With regards to the Banner and other systems integrations, is your Slate instance already integrated with your Banner SIS? If yes, what additional integration will be required?
  - A. We utilize data integration files to move data back and forth between systems, and plan to keep this arrangement in place. However, we are seeking consulting services that are knowledgeable about how best to proceed with integrations as we encounter the need to integrate more data.
4. With regards to integrating Slate with your Banner SIS, how much support from the campus IT department would be available and what will be their role in the Banner integrations?
  - A. The campus IT department will complete all integrations. We are seeking consulting services that are knowledgeable and can provide information on Slate integration and best practices.
5. Under the System Configuration and Optimization section of the Response Framework, the RFP indicates “Reporting and analytics” as an area for improvement. How extensive are the reports and analytics your campus uses that would need to be created or enhanced with the Slate instance? Would Truman clarify which user groups and audiences rely most heavily on reporting, dashboards, and analytics today, and whether there are specific reporting gaps or decision-support needs the institution hopes to address through this project?
  - A. We currently utilize reports to measure staff goals and progress according to these goals, breaking the data out by various filters, but desire to do more. We are seeking consulting services that are knowledgeable with reporting best practices and seeking efficiencies. There will always be a need for reporting and analytics development and enhancement.
6. Under the System Configuration and Optimization section of the Response Framework, the RFP indicates “Prospect management, communications, events, forms” as an area for improvement. How extensive in each of these areas is the functionalities that are you envisioning as part of the “Prospect management, communications, events, forms” enhancements?
  - A. A major portion of Truman’s current Slate system includes prospect management, communication, events, and forms. We are seeking consulting services that are knowledgeable with the operations and management of Slate operations to help ensure we are keeping up with current best practices.

7. Under the System Configuration and Optimization section of the Response Framework, the RFP indicates “Records management” as an area for improvement. Other than some of the items already listed (such as Admissions workflows and territory management) what other functionality are you envisioning as part of the “Records management” enhancements?
  - A. We are seeking consulting services to advise us on best practices and operation of Slate and keeping the system purged of any records no longer needed.
8. We are reviewing the attached RFP, and were curious regarding PART VI: Contractor Prepared Exhibits, if there were specific Truman exhibits we are to respond to, or rather, is that simply instructions on how vendors are to format/structure our response?
  - A. The exhibits represent how we would like contractors to respond to the proposal, separating these responses into various ‘exhibits’ that include the requested information.
9. The RFP indicates Truman intends to rebuild the Slate Admission system in a test instance while retaining effective components of the current environment. Could Truman elaborate on the primary drivers behind this approach versus optimizing the existing production environment?
  - A. We believe we need to build a new test environment because of the number of years that we’ve been in the current production environment, and starting fresh is preferable than trying to review all data items. However, one of the reasons we’re looking to retain consulting services via this RFP is to knowledgably advise us on our plan and options.
10. The RFP notes that Truman anticipates playing a primary role in rebuilding the system and seeks a contractor to serve as an expert advisor and implementation guide. Could Truman clarify the expected balance between strategic consulting, solution architecture, and hands-on configuration/development work to be performed by the contractor versus Truman staff?
  - A. We plan to proceed as presented in the statement. Truman IT will be the primary resource completing the rebuild. However, we are seeking consulting services to be knowledgeable and able to provide guidance and implementation support as agreed to by the two parties. This could include hands-on configuration and development work depending on the project plan (which will be developed together) for completing this work.
11. Could Truman provide additional detail regarding the desired level of modernization for the Slate Admission environment? For example, is the institution primarily seeking incremental optimization of existing workflows and configurations, or is Truman open to substantial redesign of processes, user experience, communications, data structures, and operational workflows in alignment with current Slate best practices? The RFP references implementation of Slate AI features and current best practices. Could Truman provide additional guidance regarding the institution’s priorities for AI utilization? For example, is Truman primarily interested in operational automation, communication personalization, predictive analytics, application review support, staff productivity enhancements, or other use cases?
  - A. We are open to modernization within the constructs of current best practices (especially if this includes utilizing the AI features of the system). If this requires more than incremental optimization, we are open to this.
12. Could Truman describe the current usage and adoption of Slate portals across admissions operations? Additionally, is Truman anticipating redesign or expansion of portal functionality and user experience as part of this initiative?
  - A. We currently use portals for some activity and expect to continue with this practice. We are seeking consulting services to advise us on best practices and operation of Slate – if it makes sense to expand the use of portals, we are open to doing so.
13. What user groups require training (admissions counselors, operations staff, IT, advancement, leadership)? Does Truman anticipate future support demand to be weighted more heavily toward Slate Admissions, Slate Advancement, or a balanced mix of both environments over the course of the pre-qualified contractor engagement period?
  - A. Training is an ongoing need as positions evolve, through staff turnover, etc. We would like to know what training services are available, so we have the flexibility to employ them as needed.

14. Could Truman provide an anticipated budget range, target investment level, or not-to-exceed amount for Project #1 to help respondents appropriately scope staffing, implementation approach, and proposed deliverables?
  - A. The contractor should propose a budget that, through their experience, would be needed to get a significant portion of the system running by November 1<sup>st</sup>. The contractor may want to provide a tiered budget alternatives that would indicate what could be done at a minimum, versus what can be accomplished to more significantly address the work to be done.
  
15. To ensure our strategy aligns with your infrastructure: Are we utilizing the standard Test Environment linked to your existing Production instance of Slate, or has a separate environment been provisioned by Technolutions for this rebuild?
  - A. Final determination hasn't been made, but we are considering a separate clean instance separately provisioned if necessary. We are seeking consulting services to advise us on best practices and operation of Slate.
  
16. Will Truman entertain limited-scope task orders focused solely on integrations (Banner, SSO, Pathify) if a proposer does not offer full-service Slate rebuild capabilities?
  - A. We are seeking consulting services to advise us on best practices and operation of Slate. We expect to make these determinations as part of the partnership with the selected vendor's expert advice. Truman will entertain limited-scope task orders as part of partnership agreements.
  
17. Please clarify the expected format, volume, and condition of the three years of application data to be migrated—are source exports already available or must the contractor extract directly from current Slate instances?
  - A. We are seeking consulting services to advise us on best practices and operation of Slate. This includes assisting us with best practices for determining what data should be migrated in its entirety and what can be limited to the most recent years.
  
18. Are existing real-time integrations with Banner and Pathify already in production, or will the selected vendor be responsible for net-new API development?
  - A. We are not currently providing real-time integrations with Banner and Pathify but seek to potentially rebuild the current data integration feeds if needed. We expect to make these determinations, as to best integration methodologies, as part of the partnership with the selected vendor's expert advice. Development of net-new API development is not currently expected for Banner or Pathify integration.
  
19. Is the November 1, 2026 milestone for "strategic portion" of the refresh a hard deadline tied to admissions cycles, and what specific functionality must be live by that date?
  - A. Yes, the November 1<sup>st</sup> 2026 data will support our next admission cycle. We anticipate that at least some portion of the system will need to be live to recruit and communicate with students and accept and process applications.
  
20. Beyond the five required customer references, what weighted criteria (e.g., cost, approach, higher-ed experience) will Truman apply during proposal scoring?
  - A. The specifications for how the proposals will be reviewed and awarded are listed in the RFP under Part III.