Kent State University Request for Proposal #2004 (Next-Generation Audience Engagement Platform)
Vendor Questions and University Answers

Vendor 1 of 3

1) What is/are your current email solution(s)? Is it integrated/connected with your database?
We are currently using Salesforce Marketing Cloud as our email solution.
At this time, Marketing Cloud is not directly integrated with our database. We utilize SFTP processes to transfer data in and out of the platform.

2) Are you planning to retire all other email solutions as part of this transition?
We are not looking for an enterprise-wide email solution as part of this transition. Standard email communications will continue to be managed through Outlook. Other areas within the institution currently use additional platforms; it is still to be determined whether those platforms will be retired as part of this transition.

3) Can you list all data sources that will need to be integrated/synced with your new engagement platform?
Known data sources we will need to integrate with are SFTP, Banner, Slate, Ethos, Cashnet

4) What is your current email system(s) being used for today (mass emails, drip campaigns, enrollment, direct sales, customer support, other)?
Our current email system is used for a wide range of communication needs across the university.
   – Automated Campaigns: Journeys/drip campaigns.
   – Data Collection: Embedded email forms to gather information.
   – Mass Communications: Institution-wide announcements, crisis communications, and emergency alerts.
   – Academic and Administrative Communications: Outreach from colleges, departments, Graduate College, Provost's Office, and Academic Affairs.
   – Student Engagement: Communications from Student Life and other student-facing services.
   – Student-Run Business Unit: Student Media, which is used by students.

5) How many total distinct email addresses do you expect to send email to?
We send email communications to the entire university community, including all students, faculty, and staff, as well as external stakeholders. Exact numbers fluctuate each semester due to enrollment changes, staffing, and other factors. Our current platform allows for up to 800,000 contacts. At this time, we are not at full capacity.

6) What is the total e-mail volume you anticipate sending monthly/annually?
Approx 560,000 – 640,000 emails per month.

7) How many departments will be utilizing the solution?
25-50

8) Do your departments require separate data security, branding, content, and reporting? Or can they work in a shared environment?

Some departments can operate in a shared environment for email campaigns and content. However, certain units require separate environments to ensure the security of their data and content.

The solution must provide overall, enterprise-level reporting while also supporting department-specific reporting and analytics.

9) If applicable, please list an approximate number of users by business unit (i.e. Alumni Assoc - 3, Advancement – 6, MarComm 4, etc.)
Approximately 4-6 per unit depending on the size of the unit.

10) What reporting do you rely on from your current email marketing solution?
We rely on standard performance metrics such as:
    - Open rates – to measure engagement with email content.
    - Click-through rates (CTR).
    - Deliverability rates
    - Bounce rates
    - Unsubscribe rates

In addition, we track overall email sends as well as sends by department. We also need the ability to report on these metrics by audience for individual sends that include multiple populations, as well as across multiple sends. For example, being able to view open rates by audience group (faculty, staff, students) without manually aggregating data from multiple distributed emails.

11) What are the key metrics / reports you expect to be able to monitor?
We expect to be able to monitor both standard email performance metrics and organizational level reporting as outlined in question 10.

12) What are your key objectives for digital engagement/marketing automation?
Next-Generation Audience Engagement – Deploy a unified platform that transforms university-wide digital engagement and moves beyond traditional mass email communication.

Multichannel Audience Engagement – Deliver seamless outreach across email, SMS, push notifications, and in-app messaging to engage audiences on their preferred channels.

Journey Management and Personalization – Automate audience journeys and deliver personalized content with continuous optimization through testing and performance insights.

AI and Automation for Optimization – Utilize AI-driven recommendations, predictive analytics, and behavior-based automation to improve engagement effectiveness.

Advanced Data and Audience Management – Integrate data from multiple systems into unified profiles, enable advanced segmentation, and ensure privacy compliance.

Analytics, Insights, and Optimization – Provide real-time performance dashboards, integrate with analytics platforms, and drive future improvements through data-informed insights.

13) Do you have documented personas (prospect profiles / audiences) for your digital campaign work?
Yes, enterprise-wide personas that are updated based on the communication being sent.

14) Describe a typical email campaign. Is it automated?
Our email campaigns vary depending on the department and purpose. Some campaigns are fully automated, triggered by specific events or user behaviors. Others are more advanced, leveraging AMPscript and queries to deliver personalized content. Additionally, many campaigns are manually created and sent by individual departments for targeted communications.

15) How many users do you anticipate will engaging in the marketing solution (from a training/enablement perspective)?
150-200

16) Do you market internationally? Canada? Europe? China?
Yes, possibly all countries for recruiting.

17) Will you require multiple IP addresses or domain names? If so, please describe.
One static IP address is what we have currently, but the domain name would need to be kent.edu

18) Is any of the information in your system considered regulated (PII, HIPAA)?
There could be FERPA, PII, or HIPPA.

19) How do subscribers currently opt in/out of communication (is there a need for a custom sub center)?
There are publication lists used, and subscribers can opt out of specific communications. Opting out of one publication does not affect a subscriber's ability to receive other communications within the system.

20) Do you have a need for mobile/SMS/texting? If so, how many mobile numbers will you be sending to?
We do not currently have a need, but will want to potentially utilize this after initial implementation. Possibly ~50,000.

21) What type of support requirements are important to you?
Uptime, quick turnaround time on responses, fast escalation to higher tiered support, and optional distribution method for emergency response if the system is down.

22) Do you foresee a need for on-going support post implementation?
Yes for general ticket resolutions.

<u>Vendor 2 of 3</u>

1) What is Kent State's **current mass email platform**, and how is it being used today?
   a. Current System
      We are currently using the Salesforce Marketing Cloud Platform.
   b. Number of users
      150-200
   c. Number of business units or departments
      25-50
   d. Number of active contacts
      Currently 800,000 contacts are licensed
   e. Annual email volume
      Approximately 7,681,716 a year
   f. Current business unit/workspace structure (for example: Academic Affairs, Advancement, Student Life, etc.)
      Academic Affairs, Provost, UCM, Student Life, HR, IT, College Credit Plus, Student Media. Currently Academic Affairs and Student Life have numerous departments within their unit we would like to break out.

2) Is Kent State currently using a **custom subscription center**? If so, can you describe its functionality and integration?
   Currently we are using publication lists for business units. Recipients can opt out of communications via unsubscribe or manage subscription.

3) What other systems are connected to the current platform (e.g., CRM, SIS, advancement systems, analytics tools)?
   Known data sources we will need to integrate with are SFTP, Banner, Slate, Ethos, Cashnet

4) Does the current platform use a **Sender Authentication Package (SAP)** or equivalent domain/IP authentication model?
   Yes, we use SAP.

5) Beyond the Procurement Department, which unit(s) or leadership team(s) will be **evaluating or endorsing proposals**?
   IT, University Communications, and representatives from current business units.

6) Once implemented, how many groups will leverage the new platform, and which groups specifically?
   Approximately 25-50 groups, Academic Affairs, Provost, UCM, Student Life, HR, IT, College Credit Plus, Student Media. Academic Affairs has approximately 20 groups, but some will be grouped together.

7) Will groups require **separate workspaces or business units**, or will governance be managed centrally?
   Separate workspaces will be needed.

8) Does Kent State anticipate using **different IPs or domains** for the new platform compared to today? If yes, how many?
   One static IP address is what we have currently, but the domain name would need to be kent.edu. There is a potential for additional domains.

9) For the **February 2026 pilot**, what specifically needs to be live?
   a. How many groups should be involved?
      25-50 groups
   b. Which functionalities must be available (e.g., templates, journeys, SMS)?
      Templates, journeys, automated Campaigns: Journeys/drip campaigns, reporting, queries, and mass communications. Need to have current functionality live, then additional functionality will be rolled out during later launches.

10) By April 2026 go-live, which components of the current platform (and any other tools being decommissioned) must be fully replicated or transitioned?
    Templates, journeys, automated Campaigns: Journeys/drip campaigns, reporting, queries, and mass communications. Need to have current functionality live, then additional functionality will be rolled out during later launches.

11) Number of templates
    Approximately 50

12) Automated communications
    5-10

13) Forms/data capture
    5-10

14) Are all channels (email, SMS, push, in-app messaging) part of your **initial implementation vision**, or would some be phased in later?
    No, SMS, Push, and in-app would be later.

15) If SMS is included: how many mobile numbers do you expect to target?
    We do not currently have, but will want to potentially utilize this after initial implementation. Approximately 50,000.

16) Will each group require SMS and push access?
    Possibly based on best practices. Would look for recommendations from other schools who have implemented.

17) What data sources need to be unified to enable personalization, automation, and segmentation in the new platform?
    Known data sources would be SFTP, Banner, Slate, Ethos, Cashnet.

18) Please identify the platforms providing this data.
    Known data sources would be SFTP, Banner, Slate, Ethos, Cashnet.

19) How many **distinct email addresses** do you expect the new platform will need to manage across all groups?
Currently we have licenses for 800,000 contacts.

20) What expectations does Kent State have for creating a **unified audience view** across systems (CRM, SIS, Advancement, etc.)?
Kent State expects a system that brings together data from different sources. This unified 360 view should create complete profiles of people so the university can use the information for personalized communication, reporting, and planning.

21) What gaps or limitations in your **current mass email system** are driving this RFP, and what outcomes do you hope to achieve with the new platform?
We are evaluating options to ensure we are leveraging the most effective resources and tools for an enterprise-wide system that maximizes the university's existing assets.

<u>Vendor 3 of 3</u>

1) What is your IT Development team experience with agile development methodologies (e.g., Scrum, Kanban)?
Experience in Scrum, Agile, Lean, and Kanban.

2) How will the your product owner and business stakeholders be involved in the daily or weekly agile ceremonies (e.g., stand-ups, sprint reviews)?
Depending on the methodology used, we would most likely do bi-weekly or monthly reviews.

3) What is the expected team composition from the client's side, and how will they collaborate with our development team?
4 from IT, 1-2 from UCM, 5-10 from other areas. Collaboration may depend on the development methodology used, but email/tickets, or other project management products are possible collaboration options.

4) How will the product backlog be managed, prioritized, and refined throughout the project?
Depends on the development methodology, but preferred is through the Planner board in MS Teams (similar to Trello).

5) How frequently will the client expect to receive and review new features or functionality?
After implementation is complete, quarterly updates would be preferred but may depend on vendors release schedule.

6) How will changes to the project scope be handled after the initial agreement?
Depends on the change, but most likely the request will be put in the parking lot until initial implementation.

7) What is the process for defining and prioritizing features for each sprint?
Features would get rolled out as soon as possible, then sprints would work with individual groups and they would help define the additional prioritizations.

8) What are the key performance indicators (KPIs) or metrics for success that the client will use to evaluate the project?
As an example, availability of required components as identified in the RFP, multi-year contract offerings, product uptime, support response time.

9) How many users will there be on the platform daily? Are they internal, external, or both? If there are external users, how many will need to be supported by the solution?
Only internal users, approximately 50 but fluctuates based on academic calendar and needs of the department.

10) What is the preferred cloud platform (e.g., AWS, Azure, Google Cloud)? Are there any specific requirements for infrastructure or security?
Azure is preferred platform. SSO is required.

11) What is the client's approach to quality assurance (QA) and user acceptance testing (UAT)?
Communications must be tested and previewed before sent, this is generally handled internally with the department sending the communication.
If this question refers to the project to migrate, then IT will be working with individual groups to ensure QA and UAT.

12) How will new releases and updates to the SaaS product be deployed to the production environment?
KSU prefers to push the updates in manually to control the timing, however many releases are currently scheduled automatically by the vendor.

13) What are the uptime and performance requirements for the system?
Limited downtime with scheduled maintenance after prior notification. 24hr turnaround for mission critical issues, and optional distribution method for emergency response if the system is down.

14) What is the client's strategy for data backups, disaster recovery, and business continuity?
Vendor should have redundancy planning, but depending on the product selected KSU will develop a business continuity plan.

15) What are the specific training requirements for the different user groups (e.g., VDOE staff, educators, school administrators)?
Depends on the product, but we generally use a train the trainer approach.

16) What level of ongoing technical support will be required after the system goes live?
General support for issue resolution with availability to escalate as needed.

17) How will the client manage user feedback and feature requests after the initial deployment?
Feedback will be handled internally on a case-by-case basis and evaluated by a core team for potential changes to the system. Issues or recommendations will be escalated to the vendor after internal core team review.

18) Do you prefer real-time APIs or batch data exchanges for each system? What are your existing integration patterns and expected throughput requirements?
Preferably APIs, but it depends on the system we are integrating with. Currently using SFTP to import and export data.

19) How is your current Power BI model structured for marketing and enrollment reporting? Which specific KPIs must remain as authoritative sources after implementation?
PowerBI is handled individually by departments.

20) Which audience journeys should be prioritized for the pilot phase (undergraduate prospect nurture, admitted-to-enrolled transitions, current student alerts, alumni engagement, donor stewardship)? How will you measure pilot success?
TBD for the audience journeys. Pilot success will be determined based on user and departmental feedback.

21) Which dashboards are essential at launch? Consider audience funnels, campaign attribution, and cohort retention metrics.
Tracking, send activity log, bounce rates, etc.

22) How will you handle personalization for individuals with multiple roles (student, employee, alumni)? What precedence rules should apply?
Filters in place to split the population based on attributes. Precedence depends on the department needs.

23) How is opt-in/opt-out consent currently managed across your systems, and what is your vision for a unified subscription or preference center to centralize consent management (opt-in, opt-out, subscription preferences) as required in the RFP?
There are publication lists used, and subscribers can opt out of specific communications. Opting out of one publication does not affect a subscriber's ability to receive other communications within the system.

24) Are there specific GDPR or CAN-SPAM considerations for international campuses? What digital accessibility standards and VPAT requirements must all web and email assets meet?
Yes, we have international campuses and GDPR and CAN-SPAM are essential. Currently email messaging must have a footer, but our IT Accessibility group will be reviewing for additional updates.

25) What are your data retention requirements for communication records and audience profiles? Are there specific archival or deletion timelines for student communications?
TBD, currently working on retention policy for new system.

26) How should the platform handle international student data and cross-border transfers? What restrictions apply?
TBD, internal discussions are needed.

27) How centralized versus decentralized will campaign creation be? Which roles need specific access controls, approval workflows, and unit-level guidelines?
Decentralized based on department/unit. Roles will need various levels of access.

28) Training and adoption: How will you train marketing teams across multiple campuses? What ongoing certification or governance processes will ensure platform adoption and compliance?
We will use a train the trainer approach. Teams will be trained by an internal trainer.

29) Will all users be required to log in through campus SSO (SAML)? How should multi-factor authentication be applied, particularly for different user roles? What are your requirements for IP/domain restrictions or emergency ("break-glass") admin access?
Yes, all users will use SSO. MFA is utilized for all users. IT will control access to the admin and control which users have access to different parts of the system. Special access in an emergency case would be controlled through IT as well.

30) For SMS and push notifications, which use cases have priority (alerts versus marketing)? What vendor relationships and compliance constraints exist?
We are currently not utilizing SMS and push notifications. This could be considered after go live.

31) Web experiences: Will the project include hosted landing pages and embedded forms? Are there CMS standards or brand components we should integrate?
Yes, currently departments have landing pages for signup as well as embedded email fors for data collection. Data from these must be able to be extracted via SFPT or other.

32) AI governance: What review processes and guardrails do you expect for AI-driven content recommendations, send-time optimization, and predictive models?
Functionality will be evaluated with a core team before promoting to individual units

33) What are your recovery time and data loss tolerance requirements?
Recovery Time Objective is 4 hours
Data Loss Tolerance is 30 minutes

34) Performance expectations: What peak load scenarios must the platform handle (application deadlines, emergency communications, major events)? What level of performance degradation is acceptable?
Approximately 50 users per day but fluctuates based on academic calendar and needs of the department. Peak messaging per month approximately 560,000, typically occurring at the start of each semester.

35) Migration strategy: How will you migrate data from existing email systems, including historical engagement data and suppression lists? How will you maintain sender reputation during the transition?
Uses automated scripts or migration tools to transfer data between the old and new. Data integrity will be ensured through validation at each step through reporting and analytics. By onboarding department/units individually we will be able to gradually ramp-up to help maintain sender reputation. We will also work with our email team to ensure that email authentication protocols are followed and appropriate white-listing is completed.

(End of document.)