Oregon TECH
Procurement & Contract Services

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REQUEST FOR PROPOSALS #2024-10
SLATE & STUDENT JOURNEY OPTIMIZATION SERVICES
RESPONSE TO CLARIFYING QUESTIONS I
January 30, 2025

Note that these are questions submitted by interested firms to this solicitation. The below answers are for clarification purposes only and in no way alter or amend the solicitation as published.

1. **QUESTION:** Can Oregon Tech please elaborate on "Custom CSS for form and application styling?" Our firm does not often recommend custom CSS in forms; rather, we would push to portals. For the application, is Oregon Tech aiming for more customized or dynamic branding (e.g., different branding by school/campus)?

    ANSWER: We are looking for standardized branding across all forms, applications, and portals within Slate, with the goal of minimizing the change in look and feel from the website to Slate, providing a more streamlined brand. If it would be preferable to move toward a portal where our forms are embedded, rather than adjust our CSS, we would be open to this.

2. **QUESTION:** Does Oregon Tech currently work with a preferred partner on any of the listed services?

    ANSWER: No. Nearly all work within Slate is done internally. We have hired different partners for Slate or Slate-adjacent projects, but we do not have a preferred partner.

3. **QUESTION:** For #6, is Oregon Tech open to development of a territory management/recruitment portal that contains dashboards as well as additional functionality or is Oregon Tech solely seeking dashboards?

    ANSWER: Yes, we are open to a portal that includes both dashboards and other elements/functionality.

4. **QUESTION:** For #10, is Oregon Tech requesting the configuration of this functionality AND the development of the communications (content creation) or just configuration?

    ANSWER: We are looking for both content creation and configuration.

5. **QUESTION:** Should interested proposers put additional services that might benefit the institution in an appendix or list these in the main area of our proposal response?

    ANSWER: An appendix would be preferable.

6. **QUESTION:** Has a budget been identified for this work?

   ANSWER: Budget is somewhat flexible. We would ideally not exceed $350,000. However, there may be additional suggested services that we find valuable enough to raise the budget.

7. **QUESTION:** Does Oregon Tech run student search in house or is the university using an external partner/agency for this work?

   ANSWER: Oregon Tech runs student search in house.

8. **QUESTION:** Does Oregon Tech accept electronic signatures?

   ANSWER: Yes, Oregon Tech accepts electronic signatures.

9. **QUESTION:** Can Oregon Tech confirm that Oregon Tech is using a single instance of Slate?

   ANSWER: Yes, we use a single instance of Slate. This instance is used for admission and recruitment purposes for undergraduate, graduate, and online students.

10. **QUESTION:** Can Oregon Tech provide an estimate of the number of rules that need to be converted to configurable joins?

    ANSWER: 125

11. **QUESTION:** Can Oregon Tech provide details regarding the elements Oregon Tech wants to include in the Student Portal?

    ANSWER: At minimum, we would like to include their application status/decision, outstanding materials, decision letter, and links to next steps. The portal must be visually appealing and well branded. Ideally, we embed video or other visual/interactive elements.

12. **QUESTION:** Can Oregon Tech confirm whether Oregon Tech is using a custom Student Portal or the Slate-delivered status page?

    ANSWER: We are using the Slate-delivered status page.

13. **QUESTION:** In the Scope of Work, Item 12 refers to "customized Slate training for a variety of staff audiences, from novice to advanced users." Can Oregon Tech provide details regarding the training topics (and number of sessions) Oregon Tech would like the vendor to facilitate?

    ANSWER: We are flexible and open to suggestions, but we are ideally looking for the following trainings: query and report building (including configurable join bases), portal building, setting up SFTPs, uploading materials to applications and document batch processing.

14. **QUESTION:** In reviewing Section III, Questionnaire for Proposers, specifically Subsection 4: Quality of Proposal, can Oregon Tech provide additional details regarding the information Oregon Tech is desiring for Quality of Proposal?

    ANSWER: We are looking for a proposal that is thorough, well researched and executed, provides sufficient detail, and demonstrates professionalism and thoughtfulness.

15. **QUESTION:** In the Scope of Work, item 6 refers to a series of dashboards – can Oregon Tech please confirm whether Oregon Tech is wanting to leverage Slate Portals to build these dynamic dashboards?

    ANSWER: We are open to suggestions on whether a dashboard or portal is a better option. We are looking for ease of user experience, and the ability to provide all information for the audience in one space. For instance, we want Admissions Counselors to be able to see data on their territories in one space. If a portal can provide enhanced functionality or user experience, we are very open to that solution.

16. **QUESTION:** In the Scope of Work, Item 6c refers to the 'creation of dashboards for training and documentation. Can Oregon Tech confirm if this refers to a method for storing and accessing training materials and documentation?

    ANSWER: Since the publishing of this RFP, we have decided to use the existing Slate Documentation section for training and documentation, so we will not need a dashboard for training and documentation.

17. **QUESTION:** In the Scope of Work, item 3 refers to custom CSS styling for form and application styling – can Oregon Tech confirm whether Oregon Tech will be providing the desired CSS styling to apply to these various forms? Will these styles be applied to all Slate forms/application pages or are there pre-identified forms that will need these updated styles?

    ANSWER: We want to update the look of all of our forms to improve branding and ensure a seamless transition from the website to Slate forms. We will not be providing the CSS styling; we are looking for that to be created. As referenced in the answer to Question 1, we are open to leveraging portals if that is the optimal solution.

18. **QUESTION:** In the Scope of Work, item 10 refers to dynamic email responses for Request for Information form – can Oregon Tech confirm whether this is a singular form or multiple forms? If more than one, can Oregon Tech estimate how many Request for Information forms would need configured communications?

    ANSWER: This is a singular form, though we want the response to be dynamic based on the student's campus and program of interest.

19. **QUESTION:** Are there specific areas of the Oregon Tech Slate instance that need particular attention during this Slate audit?

    ANSWER: Events, rules, and populations will need particular attention.

20. **QUESTION:** In reviewing Section III, Questionnaire for Proposers, specifically Subsection 1: Background Information, the RFP requests that we "identify specific person(s) who would be responsible for the proposed work and include a brief resume for each." Would it be acceptable for us to provide their bios instead of a resume? Please let us know if this alternative format would meet the requirements.

    ANSWER: Yes, a biography for each person responsible for the proposed work is acceptable in lieu of a brief resume.

21. **QUESTION:** Are there any go-live timelines to keep in mind for any portions of this scope?

    ANSWER: No; everything we are asking for can be fluid, and none of it is critical to our operations. We do have items we would like to prioritize, such as the graduate student communication campaign, and the entire project needs to be wrapped up in 18 months. We may also have temporary constraints on go-live dates, such as if going live may interfere with critical operations. However, we have no specific go-live dates on any single item.

End of Response to Clarifying Questions I