Casper College | Procurement Department

125 College Drive, Casper WY 82601

REQUEST FOR PROPOSALS #CC540-20

Casper College
Constituent Relationship Management (CRM) Solution

NOTICE IS HEREBY GIVEN that Casper College is accepting sealed proposals for the above project.

SEALED PROPOSALS MUST BE IN THE POSSESSION OF THE CASPER COLLEGE PURCHASING DEPARTMENT BY NO LATER THAN:
2:00 P.M. (our clock) July 1
, 2020.

Proposals will be opened at this time in **Room #310 of the Gateway Bldg.**
Please provide one (1) Original and four (4) Copies in a sealed envelope.

Proposals received after the time and date specified will <u>not</u> be considered.

Sealed proposals must be sent or delivered to:

> Casper College
> 125 College Drive
> Casper, Wyoming 82601
>
> <u>Attn. Debbie Przybylowicz, Purchasing Specialist</u>
> **<u>Gateway Building Rm. #311A</u>**
>
> Please clearly mark the outside of your envelope:
> "CRM - RFP #CC540-20"

<u>Telephone, fax, or email proposals will not be accepted</u>

Some of the specifications and qualifications noted in this RFP are either preferred or are general guidelines and are written to be somewhat flexible. At our option, we may consider variances from these specifications and qualifications. Our objective is to find the best overall proposal(s) in our opinion for these services. Although pricing is important, it will not be the only factor considered when evaluating the proposals (see evaluation section).

Casper College reserves the right to waive irregularities and informalities, even those that are shown as mandatory requirements, as long as it doesn't give an advantage to the bidder submitting the proposal or disadvantages any competing bidders. The College may also accept or reject any and all proposals. Casper College does not bind itself to the lowest proposal, but rather the proposal that is felt to be in the best interest of the institution.

ITB/RFP POSTING & DOWNLOADING:

**All Casper College ITB's & RFP's will be posted on the web-pages shown below.
Bidders are responsible for checking these sites for addendums
prior to sending in their proposals.**

Note: Bid awards are also posted on these sites.

www.caspercollege.edu/offices-services/purchasing

We also post on:

www.rockymountainbidsystem.com

Refer questions to (email is preferred):

Debbie Przybylowicz
debbiep@caspercollege.edu
Ph 307-268-2035

Sincerely,

Debbie Przybylowicz
Purchasing Specialist

GENERAL

- Proposals must be received in the Purchasing Office by the date and time specified. Proposals received after the specified date and time **will not be accepted**.
- Only **SEALED** proposals will be accepted. Please mark the outside of your envelope "Confidential" and include the proposal number. Telephone, fax, or emailed proposals will not be accepted.
- All changes or interpretations will be made by written addendum. No oral or telephone interpretations of this bid proposal shall be binding upon Casper College.
- It is agreed and understood that responses to this RFP are considered to be working documents while they are under consideration and, as such, are not subject to official bid openings. **The only information released at the public opening of this RFP will be the names of the respondents.** Only after the evaluation committee makes an official recommendation of award will prices associated with the RFP be available as public record.
- Expenses incurred in proposal preparation, pre-bid meetings, site visits, submission, presentations, demonstrations, etc. are the responsibility of the bidder and will not be reimbursed by the college.
- Awarded bidder(s) will not be reimbursed for expenses such as travel, mileage, rental car, meals, lodging, etc.
- All submittals in response to this request become public record and subject to public inspection. Any proprietary or confidential information must be clearly identified and can only be treated as such to the extent of the Open Records Act. Proprietary or confidential information is defined to be any information that is not generally known to competitors and which may provide a competitive advantage (pricing is not considered proprietary or confidential). Submittals in their entirety cannot be specified as proprietary or confidential.
- All materials submitted with regard to this solicitation become the property of the college. The college will have the right to use any ideas contained in proposals received, with the exception of proprietary or confidential information.
- Casper College will make no advance payments for materials, implementation, or labor.
- By submitting this proposal, the bidder certifies under penalty of perjury that he/she has not acted in collusion with any other bidder or potential bidder.

The following designations are used interchangeably:
- Casper College, College and The College.
- Contract and Agreement.
- Evaluation Committee and Committee.
- Proposal, Bid and Bid Proposal.
- Bidder, Person, Vendor, Company, and Firm.
- Request for Proposal and RFP.

SPECIFICATIONS AND SCOPE OF WORK

Casper College seeks a Higher Education Constituent Relationship Management (CRM) solution to provide the tools, automation, website and student information system integration, and other advanced features of state-of-the-art CRM systems on the market to meet the enrollment goals of the college. The system should address the unique needs of prospective students at all stages in the recruitment/enrollment funnel through marketing automation, lead management, automated multi-channel communication flows, predictive analytics and lead scoring, enrollment performance management, and data-driven management tools.

REQUIREMENTS

- User-friendly, web-based interface that is intuitive for students and campus professionals (faculty and staff)
- Seamless and personalized customer experience (i.e. single sign on integration)
- Responsive option to embed videos, functionality for scheduled and ad hoc communications through multiple forms of media including email, text messaging, and postal mail at a minimum
- Fluid tracking and reporting of students through the various stages of the recruitment/enrollment funnel: prospect, inquiry, applicant, admit, enrolled student
- Logic to identify the multiple steps a student takes/progress in engagement
- Centralized tracking of communication history with individuals and organizations including but not limited to the following types of contacts:
  - Phone conversations
  - Emails (both personal and automated correspondence)
  - Event attendance
  - Mailings
  - Text messages
- Ability to create and run multiple campaigns with automated workflow capabilities
- Customizable online application for admission-collects application history and recognizes students when they complete a new application and inputs their previously saved data
- Ability to manage incoming information from a variety of sources through manual entry, web-form entry, and batch importing while maintaining a high level of data integrity/intuitive duplication management, the ability to lock a field
- Detailed reporting and analytics capabilities comprised of both vendor supplied standardized reports and customizable reporting options
- Easily viewed dashboard that can be customized based on users with the ability to track key performance indicators, prospect prioritization, and progress toward goals from multiple perspectives including overall institutional outlook as well as individual territory management
- Robust bi-directional integration with the Ellucian Colleague's student information system (SIS), ImageNow, Mongoose E2E(appointment manager), google analytics, hubspot
- Implementation, training, and support services that allow Casper College to maximize the features of the chosen CRM with built in training as part of the on-boarding each user type
- Event registration and management capabilities: robust check-in, mass creation, user-friendly embeddable calendar, built in surveys/evaluations
- GDPR compliant

PREFERRED FUNCTIONS (We may consider some variances)

- Integration with email allowing for ability to reply directly to inquiries from mass e-mails without logging into a separate system or portal
- Integration with ImageNow Document imaging software
- Integration with our Digium Switchvox phone system
- Call center functionality

Please address the following in your response:

1. **Commitment to State-of-the-Art Features:** Please provide a description and examples of how your software has advanced to bring state-of-the-art features specifically targeted at higher education. How have you advanced functionality in the following areas?

    a. Enrollment opportunity management that both quantifies the opportunity we have in enrolling someone (lead scoring) and converting them to enroll as a student.

    b. Lead management so that we can easily identify the people we should be following up with. This should incorporate demographic and behavioral data as a basis for identification.

    c. Reports and dashboards - This should be a single database that includes a simple UI that allows us to customize dashboards and the ability to create custom reports.

    d. Campaign analytics - The system should allow us the capability to analyze our campaigns that collect data from email, text, website, social media, polls, and surveys to name a few.

    e. Funnel forecasting - The system will allow us to forecast key metrics and enrollment based on the data captured within the CRM system. It should take into account multiple data points and benchmark against organizational goals.

    f. Great workflow management - This functionality allows us to structure and standardize workflow for key roles involved in the enrollment process. It should alert to problems and track performance at each stage. Time stamps of key tasks are also of interest.

    g. Enrollment data analysis that allows us to stratify the enrollment funnel and other data points in many different ways such as employer, geography, psychographic category, website visits, program of interest, etc.

    h. Enrollment performance management - The system should easily point to where our enrollment process is working well. We would like to look at what elements perform the best including the representative or other element of the admissions process.

    i. Marketing automation - Allows us to target the right people in our campaigns and manage multiple campaigns across multiple channels easily.

    j. Chat

    k. Integration with Google Analytics that allows us to collect website traffic at the IP level and integrate that data throughout the CRM system as noted earlier.

2. **Company Background and Experience in Higher Ed**
   a. Please provide a brief history of your company including when it was founded, what primary market it serves, and how long it has been involved in the Higher Education market.
   b. Please include details on the number of clients you serve that are Community College and the number of clients you serve that use Ellucian Colleague for their SIS.

3. **Commitment to End – User Experience:** Please provide evidence of your company's commitment to end-user experience by addressing the following questions:
   a. Does your solution work well on a mobile device? If so, was it built using responsive design or can it only be accessed using an app?
   b. Is there a portal for students? Can applicants manage their own login username and password? What tools are available to prospects/applicants to track their own progress toward admission and enrollment (i.e. checklist of step to be completed, remaining documents for submission)? Is this individually customizable?
   c. Are there customizable features that allow different departments to leave messages for individual students within the portal?

4. **Commitment to Internal – User Experience:** Please provide evidence of your company's commitment to internal-user experience by addressing the following questions:
   a. How many steps/clicks are involved in the most common processing of information, such as logging an interaction or call? Are screens, labels, and other designed features consistent from section to section?
   b. What are the different user roles that your system is designed for and what level of "technical savvy" is required for each type of user?
   c. What items/sections are considered more advanced?

5. **Forms and Applications:** Please describe whether or not the CRM provides a customizable online application for admission and/or other customizable web forms. Include evidence about the CRM's enhancement of limitation pertaining to the following:
   a. Ability to use conditional logic in forms, thank you screens, and confirmation messages
   b. Functionality to pre-populate applications and other forms with information we already have for an individual
   c. Payment processing capabilities (If available, what types of payment does the system accept? Does the CRM integrate with payment gateways? If so, which ones?)
   d. Please address any limitation on the number of applications and forms that can be produced and what is required to make changes to them (Can Casper College update and change them at any time using self-serve editing tools or is vendor involvement necessary?)

6. **Communication Methods**

    a. Please address the different modes of marketing and communication provided through the CRM and how they can be integrated into campaign management design. In your response please provide details regarding the availability of pre-designed templates, options for customization, ability to send in batch while still tailoring messages to the individual through conditional logic, and automatic response options for incoming electronic messages.

    b. Please include specifics on the following media in additional to any others that your product has available:

        i. Broadcast Email (Please address any limits on number of messages that can be sent at one time, features to improve deliverability through spam-filters, compliance with CAN-SPAM act, and mobile-responsive design.)

        ii. Text messaging (What data must be collected in order to utilize text messaging? Please address both mass and individual text messaging capabilities.)

        iii. Postal Mail (Are there letter and mailing label templates? Tools to assist with bulk mailing?)

        iv. Call-center functionality

        v. Social Media Engagement

        vi. Online chat (group or 1:1)

    c. Please describe how the above communications are logged in the CRM (i.e. automatically when sent, manually added, etc.) and provide screenshots of interfaces to review the communication history for an individual. What tools and reports are available for permanent bounce rates, etc.? What tools are provided to inactivate "bad" phone numbers, email addresses, etc.? What reporting is available for tracking?

7. **Campaign Management and Automated Workflow:** Please explain your system's campaign management and automated workflow features including the following:

    a. Explain/illustrate how an individual is classified and converted through the different stages of the recruitment/enrollment funnel: prospect, inquiry, applicant, admit, enrolled student. How easily can they be converted to the next stage in the funnel? Is this done manually? In batch? Automatically through integration with the student information system? Does this feature keep a historic log?

    b. How are campaigns scheduled, and what level of technical expertise is required to design a multi-channeled campaign?

    c. Does the system allow for multiple campaigns to be run simultaneously?

    d. Can campaigns handle communications that are triggered by both pre-defined schedules and response to student interactions?

    e. What different methods of communication can be utilized in a single campaign?

    f. Do campaigns take student communication preferences into account?

8. **Event Management:** Please address the following in regard to the CRM's event management functionality:

    a. What types of events can be managed (i.e. on-campus, off-campus, recurring)?

b. Does the system provide for management of multiple activities/sessions within a large event such as an Orientation?

c. Do the event management components of the CRM include event pages (e.g., event calendar, registration forms, landing pages, confirmation messages, etc.)? If so, can these be built using responsive design or are they already responsive? What level of technical expertise is required to customize the content of these pages?

d. Can we drive students to different events based on an attribute or set of attributes (e.g., prospective students versus admitted students, biology major versus English major, etc.)

e. Can we create an unlimited number of registration forms?

f. Is there functionality to send confirmations, reminders, and personalized itineraries for events once a person has registered, and will these messages allow for conditional logic in order to personalize responses?

g. Will the system allow a student/guest to make changes to their own registration?

h. Does the CRM allow collection of online payments for events, and is it able to calculate individualized fees based on data collected in the event registration (e.g., person type, selected event elements, etc.)?

i. What types of event information can be stored in the system (i.e. guest limits, locations, capacity, attendance, etc.)?

j. What features are included/available to help track event attendance and automate follow-up with no-shows and cancellations?

k. Does the CRM provide survey tools for evaluation of events?

9. **Records Management:** Please address the following regarding records management within the CRM:

a. What types of records can be stored in your solution and what are the capabilities to add custom data fields? Do such customizations have to be performed by your company or can an on-site system administrator do them? Are there any limitations on the number of records that can be stored in and extracted from your system? Can records be archived and/or purged? Can a person's record have multiple roles (i.e. parent, alumni)? Can a person have multiple applications?

b. Does your solution provide the ability to batch edit and delete records? Describe the process and standard tools used to import Student Search names, test scores, etc. into the CRM from CVS and other flat files. What tools will we have available to create our own imports/exports and can these packages/templates be saved for future use? Can they be automated?

c. What is the process for identifying and resolving duplicate or possible duplicate records? Are duplicate criteria customizable, and will duplicate records be locked, sent to a holding bin, purged, etc.?

d. Does your CRM provide an audit trail that details the edits made to a record?

e. What types of user roles can be defined and how granular is the security that can be applied to these roles?

f. What type of search capabilities does your CRM include? Name, DOB, SSN, ID#, High School? And what type of filters and sorts can be applied to list results?

g. How accessible is the data in your database? Describe the process and provide screen-shots of how an end user could build an advanced query and what options are available for exporting that information.

h. Can queries, advanced filters and sorts, and other searches be saved for future use by the creator and other system users, without affecting other users?

10. **Reporting and Analytics**

a. Describe your system's ability to allow for cross-site tracking. Can it connect tracking done across institutional web properties and correlate it back to records in the CRM?

b. Describe your system's dash-boarding capabilities, content, and customization options. Does your CRM include standard and customizable report options?

c. Does it provide capabilities for year-over-year comparisons?

d. Are there standard reports that can be used to measure return on investment (ROI)?

e. What level of expertise is necessary to run reports? What level of expertise is necessary to create reports?

f. What tools does your system have to help identify probability to enroll based upon interactions, origin, geography, alumni/parent history, test scores etc.

g. Do your reports provide a funnel snapshot? Are the drill-down capabilities to work with individuals at different stages?

h. Does the CRM provide and/or integrate with tools such as Tableau and Business Objects?

11. **Integration with Ellucian Colleague and Other Systems**

a. What options are available for bi-directional integration with Ellucian Colleague (i.e. ELF, API, FTP site)?

b. What aspects of these options are manual and what aspects are automated?

c. What data can be transferred between systems, how frequently, and are third-party solutions required?

d. Does your company provide the programming for integration with Colleague, or would that be the responsibility of the college's IT staff?

e. Describe how the solution would integrate with various marketing tools such as: hubspot, google analytics, etc.

f. What options are available for integration with ImageNow document imaging software? At a minimum, does the CRM have the capability to produce pdf files of admission applications that can be exported to the document imaging system?

g. Are there any integration capabilities with our Digium Switchvox Phone System or Google Suites?

12. **Technical Specifications and Data Security**

    a. What are your hosting options (on-site, off-site, cloud-based)?

    b. Will any of our data be hosted off shore in a cloud-based solution proposal?

    c. Please describe server requirements and recommended hardware if hosted on-site.

    d. If hosted in a datacenter off-site, please describe data-ownership policies applied and what format and process will be employed to turn over the institution's data upon contract termination. Will Casper College's data be kept separate from other clients' data?

    e. Configurability and customization: What client-side configurations are necessary/available? What are the expected resource commitments from the institution's Department of IT? Can our institution customize terminology to fit our business process?

    f. Identify which components of your CRM (if any) are supported by third-party technology partners.

13. **Implementation, Training, Project Management and Support**

    a. Please describe your suggested timeline and strategy for implementation including the makeup and background of your company's leadership and implementation team

    b. How quickly your company is typically able to begin implementation after contracting with an institution

    c. Anticipated number of hours for professional services and personnel and campus personnel

    d. On-site vs. Off-site implementation support

    e. Training and knowledge transfer strategies for functional and technical users

    f. Methods for providing ongoing training and support for new features, functionality, and other updates

    g. Amount of documentation provided and how it is delivered/updates

    h. Please describe your commitment to client support including: what types of users can submit a support request and how those requests are submitted, support team hours of operation and response rates, and components of your CRM (if any) that require support from third-parties.

14. **Additional Modules, Functionality, and Future Plans for Development**

    a. What tools are available to extend use of the CRM to include additional modules to other functional areas throughout the student life-cycle?

    b. Please tell us your roadmap for the next 12 months. What will your organization be working on?

    c. Please tell us your typical timeline and calendar for updates, patches and product improvements.

PROPOSAL FORMAT

Letter of Interest / Introduction: This letter shall explain your overall desire to be awarded this contract(s) and an introduction of your company and its employees. The letter shall contain the name, address, and phone number of the person who will serve as the principal contact and who will be making the presentation on behalf of your company. The letter shall bear the signature of the person having proper authority to make formal commitments on behalf of your company.

Experience: Submittals will include a detailed description of your company's overall capabilities, experience and approach in providing the scope of services described. It will also detail the number of years your company has been in business and any projects you have been awarded that are similar in nature.

Qualifications of Key Personnel: Submit qualifications of those who will be involved in completing the scope of services.

References: Provide references for similar projects and list three (3) to five (5) comparable higher education institutions on the Ellucian Colleague Student Information System that have been implemented and are currently using your CRM solution who we may contact as references. Include the names of the organizations, a brief summary of work done, and the names, phone numbers, and e-mail addresses of contact persons.

Hosting Options: If your solution has different hosting options available and wish to present more than one, please indicate this in your response and provide separate cost proposals for each.

Pricing: Provide a total cost of ownership for the complete CRM solution as proposed including licensing, hosting, implementation services, third party solutions etc. Costs should cover five (5) years showing separate annual costs.

Contracts: If your company requires a contract to be signed, please provide a sample copy with your proposal.

Notes:

- **Proposed prices must be "all-inclusive". This includes but is not limited to the requirements listed in the RFP.**

CLARIFICATIONS / QUESTIONS

- All requests for clarifications / questions must be emailed to Debbie Przybylowicz, Purchasing Specialist, at debbiep@caspercollege.edu. The Purchasing Department will respond by email or issue an Addendum if necessary.

ADDENDUMS

- All significant changes or corrections will be made by written addendum. In the event it becomes necessary to issue an addendum, it will be available on the bid posting web-sites noted on page #2. **Bidders shall not rely on any other changes or corrections.** Bidders are responsible for checking these sites before submitting a proposal.

MODIFICATION OR WITHDRAWAL OF PROPOSAL

- A proposal that is in the possession of the Purchasing Office may be altered or withdrawn by an email, fax, or letter bearing the signature or name of the person authorized for bidding, provided that it is received prior to the date and time set for the proposal opening. Telephone or verbal alterations or withdrawals of a proposal will not be accepted. Proposals may not be altered or withdrawn after the proposal opening.

    NOTE: If the pricing portion of your proposal needs to be altered, you must resubmit the revised pricing in a sealed envelope and it must be received by our purchasing department prior to proposal opening.

- Erasures or changes must be initialed by the person signing the proposal.

DEVIATIONS OR SUBSTITUTIONS

- Any deviation or substitution from the specifications or scope of work must be noted in detail and attached to the bid form. Complete specifications must be attached for any deviations or substitutions offered. In the absence of a specifications deviation statement and accompanying specifications, the bidder shall be held accountable for full compliance with the RFP specifications. Failure to submit a specification deviation statement and accompanying specifications, if applicable, may be grounds for rejection of the item offered and or the entire proposal.

EVALUATION CRITERIA

Proposals will be evaluated on, but not limited to, the following criteria (not necessarily in priority order).

- **Pricing:** Although a concern, the bidder with the most favorable pricing may not necessarily be awarded the order.
- **Specifications/Qualifications:** Bidder has met the terms, criteria, and qualifications that are viewed to be necessary and or essential components of this proposal in the opinion of the evaluation committee.
- **Hardware/Software:** Proposed hardware and software quality and how well it will integrate with our existing infrastructure.
- **Quality of Materials:** Are the products being proposed of acceptable quality?
- **Reputation:** Information acquired through references and other sources available to Casper College. **Results of previous projects (if any) on our campus.**
- **Vendor Stability & Experience:** Length of time the vendor has been in business and amount of experience with Higher Education Institutions.
- **Value-Added Concepts:** Items or ideas that are not listed in this RFP that may further enhance and provide measurable value to the college.
- **Innovation/Creativity:** Proposals that identify new or innovative approaches.

The Casper College IT and Purchasing Department will review proposals. If this project is awarded it will be based on, but not limited to, the above criteria.

AWARD OF CONTRACT

The award(s) will be made to the bidder(s) whose proposal will be the most advantageous to Casper College, considering, but not limited to, the factors shown in the evaluation criteria. Negotiations may be a part of the award process at the option of the college.

The agreement shall be for a period of one (1) year with an option to renew each year after, not to exceed a total of five (5) years. A renewal after the first year and each year thereafter will be at the option of Casper College. At our option we may elect to renew this contract for an additional five (5) years with the same yearly renewal processes as note above.

Consideration of the factors enumerated herein and the award(s), if any, shall be at the sole discretion of Casper College.

CONTRACT REQUIREMENTS

Awarded bidder is prohibited from subcontracting, assigning, or transferring, the contract, its rights, title or interest therein or its power to execute such agreement to any other bidder, firm, company or corporation without the prior written consent of Casper College. All approved assignments or other transfers referred to herein must abide by the provisions of the agreement.

The College or the awarded bidder may terminate the contract without cause upon thirty (30) days written notice. The contract may be terminated immediately for cause if the bidder fails to perform in accordance with the terms and conditions of the contract.

The contract may be terminated if funds are not appropriated or allocated the college by governmental entities that are necessary, in the sole discretion of Casper College, to complete the terms of the contract.

We prefer no more than 30 total pages in your sealed proposal.

INVOICING AND PAYMENT

- Invoices totaling $10,000 or more will be approved once each month at the Casper College Board meeting. This meeting is normally held the third Tuesday of each month. Completed invoices must be in the possession of accounts payable the Wednesday before the third Tuesday to be considered for payment. All invoices shall be forwarded to: Casper College, Accounts Payable, 125 College Drive, Casper, WY 82601. No late fees will be paid by the College.

SIGNATURE / COMMENTS PAGE

The undersigned, being familiar with the bidding conditions and instructions, hereby proposes to provide professional services and materials in accordance with the requirements stipulated. If you are not in agreement with, or cannot abide by any of the conditions or instructions on this proposal, it must be noted in the bidder comments section below. If there are no comments noted, it is assumed you and the company you are representing are in total agreement.

_____   _____
Company Name   Telephone Number

_____   _____
Mailing Address   Email Address

_____   _____
City, State, Zip   Bidders Name/Title

_____
Authorized Signature

Dated this _____ day of _____ Year _____

Received Addendums: (please initial only if addendums were issued)

_____ #1   _____ #2   _____ #3   _____ #4   _____ #5   _____#6

Bidder Comments: (attach additional pages if needed)

_____

_____

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_____