

MISSOURI WESTERN STATE UNIVERSITY

REQUEST FOR PROPOSAL 20-022

FOR

ADMISSIONS CUSTOMER RELATIONSHIP MANAGER

Submission Deadline: August 12, 2019, 2:00 p.m. Central Time

Questions and/or requests for clarification of this RFP should be submitted via email to the Purchasing Manager, Kelly Sloan at purchase@missouriwestern.edu. All questions and/or clarifications can be sent at any time regarding this RFP to the Purchasing Department until 12:00pm on August 1, 2019. Questions received after this date may not be answered. Please reference the RFP# on all correspondence. Answers to the submitted questions will be emailed to each vendor as an addendum to this solicitation. It is the responsibility of all interested parties to read this information and return it as part of the RFP confirming receipt.

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**Introduction**

Missouri Western State University (MWSU), a public higher education institution, is seeking proposals for a Customer Relationship Manager (CRM) to manage interaction with students in Admissions Department. In collaboration with MWSU, the vendor will provide and implement a CRM software application solution in a hosted environment. The vendor will implement the hosted service by installing the software, training the MWSU users and technical staff, configuring the software based upon MWSU requirements, establishing a test environment for system testing prior to going live in a production environment. All interfaces developed between the MWSU Hosted Services solution located in Maitland, FL and the hosted CRM software solution, transferring data from the Banner system to the hosted software solution, cutting over the test system to a live production system, and closing out the implementation phase and beginning the maintenance/support phase of the project. MWSU currently uses the Ellucian (SungardHE) Banner ERP system with the Luminus Portal, Student, Finance, Human Resources and Financial Aid modules using Oracle databases in an Ellucian Hosted Services Environment supported by Application Managed Services from Ellucian.

**School Overview**

Detailed information regarding Missouri Western State University may be found at <http://www.missouriwestern.edu/>about/

**Bidder Instructions**

* Proposals may not be accepted if the RFP number is not on the outside of the envelope.
* Proposal must be prepared in accordance with Submission Material (described below). Those proposals, which are not in compliance, may be deemed non-responsive.
* The last day for questions regarding this RFP is 12:00 p.m. Central Time, August 1, 2019. These questions should be submitted to purchase@misssouriwestern.edu.
* RFP should be submitted no later than August 12, 2019 2:00 p.m. Central Time to:

Missouri Western State University

Purchasing, Popplewell Hall 221

4525 Downs Drive

St. Joseph, MO 64507

**Submission Materials**

ELECTRONIC AND/OR FAXED COPIES WILL NOT BE ACCEPTED. Responses must be signed and sealed in mailing envelopes with the Respondent’s name and address clearly written on the outside. The Request for Proposals Bid Number (RFP20-022) shall also be clearly marked on the outside of the envelope or package. The following items should be mailed to MWSU by August 12, 2019 by 2:00pm.

* Invitation to Bid Page: Complete the required vendor contact information for RFP20-022.
* Introduction: Briefly introduce your company, indicating whether the company is local, regional, national or international. Provide a profile of the company including, but not limited to, the approximate number of professional staff employed. Indicate the name of the person(s) who will be authorized to make representation for and to bind the company, their titles, addresses and phone numbers.
* Beginning on page 4 provide detailed responses to each point addressed in Proposal Section.
* References (3) specifications found on page 8.
* Pricing: Include page 9, pricing page to provide a brief overview of your proposal pricing. Specifications found on page 4, under the Proposal Term & Pricing Ceiling section.
* Addendum: Include any addendums for verification of receipt.
* Include one (1) original plus four (4) copies of all proposal submission materials for a total of five (5) hard copy documents. Also, include one (1) non-returnable flash drive with your entire proposal.

**Proposal Term & PRICE CEILING**

MWSU is seeking a multi-year contract for full implementation beginning on July 1, 2020 running for three (3) years until June 30, 2023. In addition, a quote for set-up/pilot testing is desired, which will allow for set-up and testing of the CRM beginning January 1, 2020 or sooner if deemed fitting MWSU’s timeline for installation until the main contract begins on July 1, 2020. Our current CRM is effective until June 30, 2020. It is our desire not to pay for two CRMs.

Upon mutual agreement by the vendor and MWSU, the contract may be renewed by MWSU for an additional two (2) years (ending June 30, 2025) following the initial three (3) year contract period.

**Bid Response Requirements**

All responses must include a point-by-point response to each of the sections above. Response may be described in detail under requested section or on a separate page. Failure to respond to all sections may be grounds for rejection of the proposal. MWSU reserves the right to request additional information and /or presentations, if clarification is needed. This request does not obligate MWSU to complete the proposed project and MWSU reserves the right to cancel this solicitation if it is considered to be in its best interest.

**IT/SYSTEM REQUIREMENTS & INTERFACE**

System specifications should include, but are not limited to, the items below.

1. Must be a vendor hosted service solution. Vendor should describe the type of environment that will host the software, i.e., hardware, operating system, physical computer room, computer backup, power backup, disaster recovery solution, backup/alternative computing site. Note the physical location of the host computer.
2. Describe the data backup options (tape/disk/etc.) and the options available for selecting the frequency of backups.
3. Describe how the student self-service processes are ADA-compliant.
4. Describe how users are established and what access levels are available based upon the needs of each user.
5. Describe the Disaster Recovery/Business Continuity features of your proposal.
6. System must be web-based, requiring no software installation on local client machines.
7. Describe additional add-ons (if any) that are necessary to run the web based software, e.g. installation of Active X, Java, or Flash components.
8. Describe compatibility features with Windows, Mac, mobile devices, etc.
9. Must support current and recent-past versions of major browsers such as Chrome, Firefox, Internet Explorer, Safari, Microsoft Edge and Opera.
10. Must be able to integrate with Ellucian’s Banner student information system.
11. If applicable, list and describe all data interface options available for transporting data between the Banner system and the software solution. Describe any and all additional work that must be performed by Missouri Western staff or by vendor staff in order to make any of the interface options fully functional with the Missouri Western Banner environment. Describe frequency of data pushes from Banner to vendor’s software (every 5 minutes, 1 hour intervals, 1 day intervals) and from vendor’s software to Banner.
12. Describe the physical hardware required to support your software solution and database(s).
13. Describe the data backup options and the options available for selecting the frequency of backups.
14. Describe the sign on process with regard to using the MWSU Luminis Portal system and how Single Sign On (SSO) can be incorporated for logging into the software solution. Identify any additional software required to support SSO.
15. Describe the data encryption and security measures used while transporting data from Banner to the software solution and from the software solution to Banner.
16. Must provide access to a test environment to test new functionality and integrations.
17. Explain bandwidth/storage quotas included with the basic system, and cost of additional storage and/or bandwidth.
18. Explain processes for protecting data security, including FERPA compliance.
19. Describe the technical infrastructure associated with hosting/SaaS services, including SLA thresholds, descriptions of redundancies, storage capacity, network throughput requirements, and other pertinent hosting information.
20. Explain downtime procedures, planned and unplanned.
21. Describe how, in the event of contract termination, data would be extracted and provided to MWSU.

**CRM SOFTWARE REQUIREMENTS**

Please specify whether each of the following components are part of your base system or whether they are an add-on feature and detail costs for add-on features in bid response.

**A. Data Management**

Describe processes and capabilities the system provides for managing prospect and applicant data for both undergraduates and graduates.

**B. Communications**

Describe processes and capabilities the system provides for creating communication plans and managing letter generation, email generation, instant/group chat functionality and social media integration. Include information about email analytics and the ability to generate on-going communications based on analytics data.

**C. Event Management**

Describe processes and capabilities the system provides for managing events, including online registration, event communications, and event reporting.

**D. Telecounseling Management**

Describe processes and capabilities the system provides for managing telecounseling teams, including script management, email follow-up, direct-mail follow-up and reporting.

**E. Reporting**

Describe the processes and capabilities the system provides for generating dashboards and ad-hoc reports as well as any canned reports that are delivered.

**F. Record Imports**

Describe the processes and capabilities the system provides for importing records including the ability to create additional file imports for non-delivered templates.

**G. Predictive Modeling**

Describe the processes and capabilities the system provides for rating students based on historical data and as new data is entered into the system.

**H. Scalability**

Describe the pricing structure for scaling up this system across campus in terms of maximum number of users, maximum number of records and the availability of add-on features to support student retention.

**I. Warranties, Software Maintenance, Training, Data Breach Liability**

Describe all warranties, software maintenance and training that will accompany the software. Describe vendor’s liability coverage in the event of a data breach that exposes confidential, protected, or personally identifiable information.

**J. Student Portal**

Describe the access given to students from the recruit state clear through graduation and beyond. Explain how the software fosters collaboration and socialization among students.

**K. Retention Portal**

Describe how the software enables MWSU to track and monitor student success.

**INSTALLATION, HELP DESK & DOCUMENTATION**

1. Describe all installation process options and data conversion options and provide a typical installation time schedule.
2. Describe suggested training and any additional cost for institution’s technical staff and end-users.
3. Describe implementation support services, including delivery and installation, customization support, integration support, consulting support etc.
4. List documentation provided, including technical documentation, online guides, etc.
5. Describe the process in which functional users and administrators receive ongoing support once the implementation process has been completed (e.g. on-line support, phone-in support, vendor provided help desk services, documentation).
6. Describe the service offerings and frequencies for software updates, new releases, corrective patches, etc.

**Optional Services**

Vendor should provide MWSU with any related services, enhancements or features that it feels would be beneficial to MWSU as well as related costs. Such optional services may be included in the agreement with a detailed description.

**REFERENCES**

Every vendor must provide at least three (3) references, which reflect a successful implementation of similar scope and size. References should include the following information:

* Customer name and address
* Contact person and telephone number
* Description of the Project
* Number of students

**rfp TIMELINE**

RFP Issued July 25, 2019

Deadline for Submission of Questions August 1, 2019

RFP Open Date August 12, 2019

Zoom Presentations by Finalists (if requested by committee) 3 weeks beginning August 19

Selection Committee Recommendation No later than October 1, 2019

Contract Awarded\* October 25, 2019

\*Unless Board of Governor’s approval needed, then new date will be determined

**Evaluation and Selection**

For vendors who meet the minimum qualifications their proposals shall be evaluated by the Selection Review Committee.

Responses to this RFP will be evaluated upon the features and functionality stated in the proposal and the related costs as well as the responses provided.

Factors that will be considered during the assessment and decision process include:

1. bids for services added by the vendors if the added services are judged to be desired by MWSU.
2. information from references provided by prior and current customers of the vendors.

**On campus or ZOOM interviews**

Finalists may be interviewed on campus or via Zoom (1 hour limit for presentation), allowing vendors to present a summary of their qualifications and proposals.



**Pricing Page**

Please include information regarding your pricing structure for the set-up/pilot testing and subsequent years. Include also your pricing for initial implementation year and then subsequent years and any additional information that would be helpful.

Set-up/Pilot testing until June 30, 2020 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Initial year pricing (7-1-20 to 6-30-21) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Second year pricing (7-1-21 to 6-30-22) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Third year pricing (7-1-22 to 6-30-23) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Optional Fourth year (7-1-23 to 6-30-24) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Optional Fifth year (7-1-24 to 6-30-25) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CONDITIONS OF BID AND SALE:

The vendor must comply with all Federal, State and Local regulations and laws.

Proposals received after the deadline will not be accepted or considered.

Missouri Western State University reserves the right to reject any and all proposals received in response to this RFP and to waive any minor irregularity or informality.

Authorized Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_