April 11, 2016

To Whom It Concerns:

Calhoun Community College will receive sealed bids on Bid #16-25 in its Business Office until 2:00 p.m. on Tuesday, May 3, 2016 for Customer Relationship Management Software. All bids received after this time will not be considered. The Bids will be publicly opened and read aloud.

*If your company will not be submitting a bid, you must complete the “No Bid Response Form” and return it to the address indicated in order to remain on future bid lists.*

Any questions relating to the specifications of this bid may be directed to Patricia Hughes, at 256-306-2541 or pat.hughes@calhoun.edu. Please allow time for consulting with technical advisors for answers to questions. Thank you for your interest in Calhoun Community College.

Sincerely,

Patricia O. Hughes
Director of Office Management and Purchasing

Attachments: General Conditions and Instructions to Bidders

BID #16-25 Specifications & Forms
General Conditions and Instructions to Bidders

1. All bids are to be in sealed envelopes with the opening date and bid number to be on the outside of the envelope. Bids should be mailed to: Calhoun Community College, ATTN: Patricia Hughes, P.O. Box 2216, Decatur, AL 35609 or 6250 U. S. Highway 31 North, Tanner, AL 35671. If you have questions regarding this bid request, contact Patricia Hughes at 256-306-2541. Bids may be hand delivered to the bid opening. Bidders are not required to attend the bid opening. We will not accept bids that are faxed. Bids delivered by Federal Express, Airborne Express, and all other delivery services must be labeled with “bid enclosed” along with the opening date and bid number on the outside of the delivery service’s envelope.

2. Only written modifications to proposals will be accepted.

3. The College reserves the right to accept bids in any combination, or reject any bid or part thereof and waive information that might be in the best interest of the College. The College expressly reserves the right to reject all bids if, in its sole discretion, the College believes the rejection of all bids would be in the best interests of the College.

4. All bids are to include delivery dates of merchandise. All shipping and handling charges shall be the responsibility of the successful bidder, unless stated in the bid quote. All bid prices are to be quoted F.O.B. (Free on Board) to Calhoun Community College, Decatur, Alabama. The successful bidder must assume all liability/responsibility for damage in transit.

5. Reference in the specifications to name brands, catalog numbers, etc. is for the identification purposes only and is no way intended to eliminate or discourage the offering of substitute items which equal or exceed the specifications. If substitute brands are offered, specifications for those brands must be included in the bid package. Failure to supply these specifications may result in the rejection of the bid. When the bidder does not state brand name or catalog number, it is understood the offer is exactly as specified.

6. Unless otherwise indicated, items furnished under the request must be new. Guarantees/warranties are to be furnished by the vendors as provided by the manufacturer.

7. Bid prices are not to include tax. The College is a State of Alabama Institution. If your company gives a discount, this must be included in the quote. The college writes accounts payable checks on the 1st and 15th of each month, no exceptions.

8. All items are to be free from defects in material and workmanship. If items are found to be defective or damaged or do not meet the specifications, they are to be replaced immediately by the Vendors at no additional cost to the College. If a company is awarded a bid and the company cannot honor the terms of the bid, the company may be removed from the College’s preferred vendor list.

9. No payment will be made until all items have been received in good condition.

10. After the bids are opened, all bids become the property of the College and will be made available for public inspection.

11. The proposal is to be made without connections with any other person, company, or party making a bid proposal and is to be in all respects fair and in good faith, without collusion or fraud.
12. Alabama Law (Section 41-4-116, Code of Alabama 1975) provides that every bid submitted and contract executed shall contain a certification that the vendor, contractor, and all of its affiliates that make sales for delivery into Alabama or leases for use in Alabama are registered, collecting, and remitting Alabama state and local sales, use, and/or lease tax on all taxable sales and leases into Alabama. **BY SUBMITTING THIS BID, THE BIDDER IS HEREBY CERTIFYING THAT THEY ARE IN FULL COMPLIANCE WITH ACT NO. 2006-557.** They are not barred from bidding or entering into a contract pursuant to 41-4-116, and acknowledge that the awarding authority may declare the contract void if the certification is false.

13. Bid awards are subject to change or cancellation due to unanticipated decrease in funding (including tuition, local, state or federal). Bid awards are also subject to change or cancellation due to changes in local, state, federal laws, regulations or policies or in changes in the policies of the Alabama State Board of Education or the Department of Postsecondary Education.

14. Act 2001-955 requires the Disclosure Statement (included with this bid request) be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of $5,000.00.

15. Nonresident Bidder Information: Section 39-3-5 of the Alabama Code provides as follows:

**Preference to resident contractors in letting of certain public contracts: reciprocity.**

(a) In the letting of public contracts in which any state, county, or municipal funds are utilized, except those contracts funded in whole or in part with funds received from a federal agency, preference shall be given to resident contractors, and a nonresident bidder domiciled in a state having laws granting preference to local contractors shall be awarded Alabama public contracts only on the same basis as the nonresident bidder’s state awards contract to Alabama contractors bidding under similar circumstances; and resident contractors in Alabama, as defined in Section 39-2-12, be they corporate, individuals, or partnerships, are to be granted preference over nonresident contractors in awarding of contracts in the same manner and to the same extent as provided by the laws of the state of domicile of the nonresident.

(b) A summary of this law shall be made a part of the advertised specifications of all projects affected by this law. (Acts 1984, No. 84-228, p. 348; Act 2001-637, §1.)

16. Alabama laws require that, as a condition for the award of a contract by a college to a business entity or employer with one or more employees working in Alabama, the business entity or employer must provide documentation of enrollment in the E-Verify program. During the performance of the contract, the business entity or employer shall participate in the E-Verify program and shall verify every employee that is required to be verified according to the applicable federal rules and regulations. The contractor’s E-Verify Memorandum of Understanding must be included with the bid. If you do not believe these requirements are applicable to your entity, include an explanation justifying such exemption. An entity can obtain the E-Verify Memorandum of Understanding upon completion in the E-Verify enrollment process located at the federal web site www.uscis.gov/everify. The Alabama Department of Homeland Security (http://immigration.alabama.gov) has also established an E-Verify employer agent account for any business entity or employer with 25 or fewer employees that will provide a participating business entity or employer with the required documentation of enrollment in the E-Verify program. An Employer Identification Number (EIN), also known as a Federal Tax Identification Number, is required to enroll in E-Verify or to establish an E-Verify employer agent account.

17. For all contracts executed under bids, Alabama law now requires the following clause in all contract or agreements: **“By signing this contract, the contracting parties affirm, for the duration of the agreement, that they will not violate federal immigration law or knowingly employ, hire for employment, or continue to employ an unauthorized alien within the state of Alabama. Furthermore, a contracting party found to be in violation of this provision shall be deemed in breach of the agreement and shall be responsible for all damages resulting therefrom.”**
Calhoun Community College (CCC) is seeking bid proposals from qualified vendors for a Customer Relationship Management (CRM) software in order to provide improved recruiting and marketing communications to potential students. The College is interested in vendors who can demonstrate the following elements contained in the proposed CRM solution:

1 Technical Requirements

Calhoun Community College is seeking a product that can easily interface with several on-campus services. Calhoun enterprise applications that should interface with the CRM solution are: Blackboard (LMS), Ellucian Banner Student Information System (SIS), and Outlook (O365) for email and calendar.

1.1. Calhoun Community College is seeking a hosted cloud solution. Define the environment required to run the software. Define the hardware and software requirements/considerations to operate/interface the system as proposed. We realize there are often various hosting options. Please describe your hosted and Software as a Service (SaaS) model if applicable.

1.2. For hosted or SaaS environments, please outline uptime and downtime and any SLA agreements.

1.3. CCC would like to be as self-sufficient as possible, please details how CCC can query the database and execute custom report requests.

1.4. Do you offer remote administration of the service? Explain how this is provided.

1.5. We require test, development and production instances of the CRM solution. Detail instances provided.
1.6. We require appropriate procedures be included, which insure the integrity of the data in case of system failure. Indicate the type of procedures provided. This is a mandatory requirement.

1.7. Detail your out-of-box CRM solution. (Be sure to include specific release/version being offered.)

1.8. What are the hardware/software/browser requirements of functional users’ desktop and/or laptop computers?

1.8.1. What are the requirements for access using mobile devices?

1.9. Explain how you provide seamless integration to interfacing systems on multiple and diverse platforms. Describe the technology used.

1.10 CCC currently uses Ellucian Banner as its student information system. Please explain how you would provide:

1.10.1 A Banner SIS interface and whether it is a standard part of your solution or customized and whether it is batch or real-time. If such an interface does not exist include the estimated cost of providing this function in your pricing proposal. This is a mandatory requirement.

1.10.2. Please provide a roadmap specific to the interface with Banner SIS.

1.10.3. We require a CRM solution that when successfully interfaced and operational with Ellucian Banner will not negatively impact or slow SIS performance. Detail how such an interface will meet this requirement.

1.10.4. Explain your past success(es) with interfacing your Higher Education CRM solution with Banner. Successes, both hosted on-premise and off-premise, are defined as Higher Education clients who are live and using your CRM solution that is the same or very similar to the solution being proposed. What was the most difficult implementation and why?

1.10.5. Detail the specific scenarios that would negatively affect the system’s performance, cause the CRM solution to improperly function, or cease to function.

1.10.6. We seek a solution that may allow for a separate repository of data or data that can be interfaced with Banner. Explain what solutions you offer, whether you recommend one solution vs. another and why; what hardware/storage considerations are needed.

1.10.7. We seek a CRM solution with a two-way interface with the SIS. Does the CRM solution offer a means to define frequency of a two-way interface with the SIS?
1.10.8. We require a CRM solution that allows for real-time and/or batch/bulk data transfers to other CCC systems via an API and/or software developer’s tool kit for use by institution’s IT staff. Describe how you deliver this solution. This is a mandatory requirement.

1.11. Demonstrate/explain how your solution distributes volumes of outbound email with merged data and personalization.

1.12. What mobile platforms are supported by the CRM solution? How are mobile capabilities implemented? (i.e. mobile-enabled, apps, etc.) How are new mobile capabilities developed? By whom?

1.13. Identify which components of your products or services are provided by third-party technology partners. This includes OEM software, hosting, et al.

1.13.1. Provide the third-party technology partner(s) name(s), address(es) and contact(s), as well as explain additional costs or fees associated with the components.

1.13.2. What are the underlying technology(ies) for the component(s) provided by third-party technology partner(s)?

1.14. What storage/memory requirements are required to archive all channels of communications?

1.15. Does your CRM solution use a single database instance (as opposed to multiple instances) that can be accessed and maintained by all departments/programs, offices etc. across the enterprise?

1.16. Detail required CRM customization needs, options or requirements to make this a viable solution for Calhoun Community College.

1.16.1. Does your CRM solution manage the full student life-cycle in a single system? Explain how your solution can integrate marketing, recruitment, and retention activities.

1.17. How often is the software updated and releases made available?

1.18. What is the lag time between new releases of software and updates of the documentation?

1.19. Describe how patches, updates, and releases are covered under contract.

1.20. Who is responsible for installing patches, updates and releases?

1.21. Is the proposed solution built on a single code base? If not, describe the various proposed solutions?
1.22. Provide a task list/timeline required for implementation of your solution at Calhoun Community College.

1.23. Define support and maintenance provided.

1.24. Please describe your best practice consulting options.

1.25. Define phone and web support provided and any priority system to provide for urgent support, hours of operation, location of support services, and any plans to change hours of operation.

1.26. Explain how your system provides user-friendly display of information via graphical user interfaces.

1.26.1 Explain how the user interface may be customized to specific user groups?

1.26.2 Explain how configurable dashboards for different departments are provided that gives control over data access and features.

1.27. How many languages does your solution support? Please detail?

1.28. What is the maximum number of concurrent users logged in simultaneously that your system can support? Describe how your system defines concurrent users.

1.29. Does your solution have published open API’s, support XML or ODBC data sharing?

1.30. Does your solution support a CAS authentication model for SSO capabilities? If not, what are the options?

1.31. We prefer the following: Please describe if and how you deliver these solutions:

1.31.1. A comprehensive data dictionary of database.

1.31.2. Ability to add fields and or tables to the database. This is a mandatory requirement.

1.31.2.1 We require the flexibility in creating user defined fields as and when required.

1.31.3. A simple (administrator) end user ability to monitor system performance.

1.31.4. Having tools and procedures for load testing.

1.32. Please provide a roadmap of your hardware/software solutions that reflects their present states as well as future states for at least the next 18 to 24 months.

1.33 Ability to import student/prospect data from external systems such as external databases, Excel sheets etc.
1.34 Ability to associate and store incoming data files, documents, PDF files, images, .wav files, etc., with students and applicants.

1.35 Explain how the CRM can be integrated with the Calhoun Community College public web site.

2 Access and Permissions

Security Access, permissions and security are always a key concern, especially with the potential number of users of the system, as well as the extent to which users should have access to view, create, edit or delete data/content. Calhoun Community College seeks to understand the following:

2.1 Please explain how access is granted to the CRM system.

2.1.1 We require the ability to maintain a complex organization hierarchy (department mapping) for defining the appropriate roles and permissions. This is a mandatory requirement.

2.2 How does your system authenticate users? Please explain your authentication method? At Calhoun Community College we currently use Active Directory to provide authentication services for numerous applications and web single sign-on is accomplished through CAS for some services.

2.3 Authorization should be handled within the system and provide different levels of access for different jobs or roles within a department or the institution. System functions must be able to be secured at various levels to be determined by an administrator (system administration, campaign creation/updating, communications tracking, etc.) Please explain how permissions are established and controlled in the CRM system. This is a mandatory requirement.

2.4 System must be securely accessible by staff not physically located in an on-campus office. Most if not all operations should be available via a web interface. Describe how you deliver this solution. This is a mandatory requirement.

2.5 Describe the audit trail capabilities of the system (auditing from within the applications as well as outside the application including logging functionality of database changes by end user).

2.6 Please provide details and circumstances where customers experienced data loss.

2.6.1 Provide details of your policy on loss prevention.

2.6.2 What is the recovery process? How often is it tested?
2.6.3 Detail your intrusion protection procedures.

2.6.4 How do you ensure secure transmission of data?

2.7 Describe how you achieve ADA compliance.

2.7.1 If a VPAT is available please include in your response.

3 Recruiting, Admissions, and Advising

3.1 Constituent Types

Calhoun Community College requires the ability to upload, manage, track, monitor, communicate and report with a wide variety of constituents – prospective students, admitted students, enrolled students, recruitment event attendees, faculty members, campus staff, and others.

3.1.1 How many constituent types can one have in the CRM system and how are they defined?

3.1.2 We prefer to manage constituent types in several different ways. As a result, we require granular user permissions levels and access levels for functional users of multiple offices. Please detail permission roles and access levels offered by your CRM solution.

3.1.3 Describe how portal views can be configured for each type of constituent.

3.2 Multi-Channel Communications, Marketing, Campaign Management

Our business operations are often complex as we effectively identify, target, and communicate with or market to our constituents. We seek a CRM solution to effectively handle and manage multiple channels of communications for Admissions and Advising operations. Channels may include chat, outbound and inbound emails, letters, postcards, inbound and outbound phone calls, web, fax, etc. More specifically:

3.2.1 We require the system to facilitate individualized communications to targeted or segmented constituents. This is a mandatory requirement. We prefer the following features/functionality, and please describe how you provide the ability to:

3.2.1.1. Create, edit, test, query, schedule and automatically send and report more than 150,000 or more undergraduate recruitment and admissions targeted and segmented emails per year.

3.2.1.2. Format, edit, test, query, schedule and automatically output more than 300,000 letters and other undergraduate print materials that are mailed in-house.
3.2.1.3. Ability to input conditional content based on data properties into emails, letters, postcards and SMS. This is a mandatory requirement.

3.2.1.4. Ability to personalize subject line and email content. This is a mandatory requirement.

3.2.1.5. Controls by functional users or administrator to increase or decrease the amount of emails being sent by the system.

3.2.1.6. Ability to easily and quickly set up web-based applications and forms for recruitment, admissions and marketing initiatives to collect initial or additional student data.

3.2.1.7. Use graphic rich/html emails.

3.2.1.8. Stop communications or shift to alternate campaigns when certain criteria are met (e.g. a student submits an application), while eliminating duplicate communications.

3.2.1.9. A campaign building sequence that is presented in a graphical or Visio style workflow.

3.2.1.9.1 Drip marketing feature that allows for the timing of messages to follow a predetermined path in combination with the ability to send emails/other correspondence based on specific behaviors, actions or status of the prospect.

3.2.1.10. Evaluation criteria to determine a student’s likelihood of enrollment and trigger targeted responses.

3.2.1.11. Management of email and mail opt-outs. Please explain how this is achieved.

3.2.1.12. Automatically handle temporary email bounce backs. Please explain how this is achieved.

3.2.1.13. Automatically handle permanent bounce backs. Please explain.

3.2.1.14. Ability to track history of admission decisions and associated dates

3.2.1.15. We prefer a system that can provide address verification and standardization for address information entered. Describe how you can meet this preference.

3.2.2 We prefer communications and interactions, regardless of channel, be viewed through an individual contact record as well as also provide a means to view all communications and interactions via a single viewing means. Please describe how you provide this feature.
3.2.3 We prefer the following multi-channel features/functionality be inherently integrated within the out-of-the-box solution, and please describe how you provide for:

3.2.3.1. On-screen and exportable tele-counseling call lists for admissions advisors.

3.2.3.2. Integration, monitoring and tracking of social media interactions with varied constituents and social media networks.

3.2.3.3. SMS text messaging to communicate with various constituents.

3.2.3.4 Ability to assign geographic and demographic information about prospects and applicants, and utilize this information in customized marketing plans.

3.2.3.5 Ability to track the individual’s level of interest in the institution, and utilize this information in marketing and communication plans.

3.2.3.6 Ability to identify special academic programs or services for an individual and whether they have been offered, accepted or rejected.

3.2.3.7 Ability to track activities, interests, work experience, volunteer activities, leadership activities, legacy information, first-generation college students, and other demographic information and utilize that information in communication and marketing plans.

3.2.4 We require the ability to create, audit, monitor, track, report on and analyze communication outputs (i.e. letters successfully printed, total emails sent/received/opened/link click thrus, etc.). Please describe how you provide this feature.

3.2.5 Please detail how the CRM solution handles job scheduling, printing and system backup/recovery. This is a mandatory requirement.

3.2.6 We require the ability to easily create custom data loads from a variety of sources, and prefer the following features/functionality. Please describe how you:

3.2.6.1. Provide the ability of the system to incorporate testing score loads from Compass, Accuplacer, ACT, and SAT.

3.2.6.2. Offer web-based/online inquiry forms that load to the CRM solution.

3.2.6.3. Offer web-based/online application for admission forms that load to the CRM solution. This is a mandatory requirement.

3.2.6.3.1 Should have the ability to save and return to complete the application at a later date. This is a mandatory requirement.
3.2.6.3.2 Multiple pages with different content for each application type with support for uploading attachments, such as transcripts.

3.2.6.3.3 Intelligent status trackers to determine the status of each application and alert candidates to incomplete portions.

3.2.6.3.4 Should have the ability to prevent or eliminate duplicate applications for the same student within the same application term.

3.2.6.5 Automated workflows that can be determined for different application forms. This should include specific customization of application content according to applicant type with unique filtering options. This is a mandatory requirement.

3.2.6.5.1 Provide the ability to automate assignment of inquiry/lead, based on territory or other criteria.

3.2.7 We require a CRM solution to support and handle the business rules of Admissions and Advising. We prefer the following features/functionality, and please describe how you:

3.2.7.1. Support name and contact information for constituents, both domestic and international, as well as key admission information (i.e. test scores, supporting documentation, GPA, etc.) and interests (majors, minors, academic, clubs, organizations, sports, activities, etc.).

3.2.7.2. Ability to edit student record in CRM system, with frequency and business rule option to pass edited information back to the SIS, Ellucian Banner.

3.2.7.3. Able to identify possible duplicate records. This is a mandatory requirement.

3.2.7.4. Recognize and prioritize constituents’ multiple addresses (permanent, temporary, etc.), phone numbers (home, cell, etc.) and email address.

3.2.7.5. Allow functional users to add, modify or delete constituent data fields as needed over time.

3.2.7.6. Employ a workflow engine created/modified by functional users so that inquiries, communications, operational actions, approvals and transactions may be routed to the appropriate person(s) or campus office(s) based upon complex business rules.

3.2.7.6.1 Explain how requests that are automatically routed are monitored and tracked to ensure timely resolution.

3.2.7.7. Configure CRM system screens specific to a user’s role by department via an edit or drag-and-drop wizard without changing code.
3.2.7.8. Allow new or added data elements to be easily added and used as part of data import/export as well as in campaigns, communications, tracking, filtering and reporting.

3.2.7.9. Able to record unique contact information whether entered through a mass means or individual notes.

3.2.7.10. Ability to assign prospects and applicants to specific recruiters. Henceforth the recruiters become relationship managers for the applicants during the admissions process.

3.3 Events Management

We prefer the following features/functionality; please describe your solution for each:

3.3.1 Web-based/on-line self-service registration forms

3.3.2 Web-based/on-line event(s) calendar(s) or listing(s)

3.3.3 Registration database(s)

3.3.4 Attendance caps/capacity limits

3.3.5 Automated communications (confirmations, reminders, follow ups, satisfaction surveys, etc.)

3.3.6 Calendar appointment

3.3.6.1 Customizable appointments types

3.3.7 On-site check-in

3.3.8 Guest lists

3.3.9 Waiting lists

3.3.10 Staff calendaring/scheduling

3.3.11 Event summaries/comparisons/reporting

3.3.13 Staff/counselor assignments

3.3.14 Event planning task/check lists

3.3.14.1 Ability to plan and execute recruiting events and activities while tracking invitation and attendance.

3.3.15 Event expense tracking

3.3.16 Attendance summaries
3.3.17 Creation of new constituent record, if first point of contact
3.3.18 Integration with existing constituents’ records
3.3.19 Mechanism to handle duplicate submissions
3.3.20 Ability to search for participants by event, event type, date, participant role, or any field in the event.
3.3.21 Personalized workflow for follow-up campaigns using a simple and intuitive step-by-step workflow chart.
3.3.22 Use of e-mail, phone, print, and SMS as part of event campaign and follow-up.
3.3.23 Ability to schedule and track customized, rules-based marketing campaigns that track contacts and trigger future communications.
3.3.24 Ability to route the responses to the appropriate event staff based on a pre-set business rule.

3.4 Travel Management

We prefer the following travel management functionality, and please describe each:
3.4.1 Organize and attach/archive invitations (emails and PDFs).
3.4.2 Organize and manage constituents’ data.
3.4.3 Track event status and details.
3.4.4 Organize and track staff expenditures expenses.
3.4.5 Track required travel materials for event/activity.
3.4.6 Allow for input of feedback post-event.
3.4.7 Report activities and outcomes via spreadsheets, dashboard, etc.
3.4.8 Integrate with Google Maps and/or Mapquest.
3.4.9 Display multiple or recruiter specific events in list and calendar formats.
3.4.10 Integrate with Calendars, i.e. Outlook/O365.
3.4.11 The ability to aggregate calendars into service calendars.
3.4.12 Send attendance confirmation emails.
3.4.13 Analyze expenses to determine Return on Investment (ROI).

3.4.14 Archive travel management activities’ details, expenses and results.

3.4.15 Ability to manage territories and connect data points related to geo-regions.

3.4.16 Ability to connect data points related to recruits and applicants.

3.4.17 Create, edit and delete constituent records.

3.4.18 Mobile-friendly access from remote locations.

3.4.19 Various permission roles and access levels.

3.5 Records Management

We require the ability to manually and/or automatically purge and/or archive records based upon the business rules and policies of the College. This is a mandatory requirement. Please detail the following and explain your solution for each:

3.5.1 Manual process for purging and archiving.

3.5.2 Automatic process for purging and archiving.

3.5.3 Storage capacity limits of the CRM system related to record retention.

3.5.4 Future access of archived records.

4 Reporting for Recruiting, Admissions, and Advising

We seek a CRM solution that offers robust reporting tools and pre-delivered and fully customizable reports that reflect the full functionality of the proposed system. Reporting would reflect the outcomes of Recruitment, Admissions, and Student Success. More specifically, we would like an explanation about your solution for each of the following:

4.1 Management reporting tools that can easily be developed and run by functional users.

4.2 Data is to be fully accessible for reporting purposes. This is a mandatory requirement.

4.3 Custom data fields are automatically available in reporting.

4.4 User-friendly reporting environment, i.e. dashboards, visual funnels, etc. that allows easy access to data with minimum amount of training.

4.5 Reporting of basic analytics reflecting the effectiveness and Return on Investment (ROI) of campaigns (i.e. successful delivery, bounce backs, open rates, click thru rates, popular links, etc.) as well as individual communications.
4.5.1 Analysis tools are needed to determine success of recruitment campaigns (enrollment, expenditures, and effective practices).

4.5.2 Key metrics can be displayed as a real-time “dashboard”.

4.5.3 Built-in reports can be customized.

4.5.4 Reports can be designed, modified, and saved.

4.6 Reporting available via campus and remote locations.

4.7 Ability to save data for trend analysis/historical data.

4.8 Automated report scheduler with output sent to an intranet, database or report via email.

4.9 Reporting to encompass successful and unsuccessful execution of multi-channel communications and outputs.

4.10 Reporting related to hardware, software and any other technical aspects of the system.

4.11 Reporting/monitoring of functional users’ activities and productivity.

4.12 Please outline, and if available provide documentation, detailing the robustness of the proposed CRM solution’s reporting capabilities.

4.13 Describe how your solution provides a central view of contacts and requests.

4.14 Describe how your solution provides a secure user interface for prospects, applicants, students and alumni to create and manage their profiles.

4.15 How are personalized pages or views presented to students to allow announcements, documents, files and notes in multiple formats including video, audio and multiple document files?

4.16 Describe how can we change the look and feel of the portal/ views to CCC standards?

4.17 Describe the system’s ability to maintain in-depth information about a student (or prospect etc.) spanning various parameters and events.

5 Implementation

5.1 Describe your recommended implementation strategy including on-site coordination and support services, best practices, consulting options and professional services.

5.2 Provide detailed implementation timelines. (Should reflect all aspects through go-live.)
5.3 Outline the staffing and composition of the implementation team comprised of College and vendor staff, vendor roles (skillset, responsibilities, past implementation experience, and availability to CCC), and proposed hours required for successful CRM implementation.

5.4 Identify any third party vendors involved in your implementation strategy and describe these relationships. Be sure to detail associated licenses, fees, costs, or other implementation requirements and the third party’s name, address and contact. Costs should be shown in the Cost Proposal.

5.5 Describe your recommended strategy for Calhoun Community College staffing needs to properly support your product after implementation to ensure product success.

6 Training/On-going Customer Support

6.1 We require training and customer support from the vendor. Describe your training and customer support models. Include typical training schedules and how it fits into the implementation process.

6.2 We require training programs for functional end-users. Describe your program.

6.3 We require training programs for technical personnel. Describe your program.

6.4 If available, describe your Train-the-Trainer program.

6.5 Please detail what training would be on-site vs. remote vs. self-help.

6.6 Describe the technical support available for administering your system. What are the hours of availability? What type of support is available (web, email, phone, chat, built in help features, FAQ)?

6.7 What is the expected response time and method on technical issues?

6.8 Explain what type of documentation or help system is included in the CRM solution.

6.9 Do you support user groups or advisory boards for the proposed solution? Do they operate independently from your company? Are they national? Are they regional?

6.10 What services or events do you offer clients to maximize or leverage the features/functionality of the solution?

6.11 How do you manage and organize on-going contact with your clients? Please describe.

6.12 How do you obtain and prioritize feedback for changes or enhancements to your solution? (i.e. user groups, events, customer service, company representatives, etc.)

6.13 Describe your service level agreement.
6.14 Please provide a copy of your standard maintenance contract.

6.15 Where is your primary support location and what are the hours of service?

6.16 Account Manager: CCC prefers a single point of contact for all questions, support concerns and overall account management. Describe how you provide this service.

7 Additional Features and Functionality

Calhoun Community College would like details about several additional specific features/functionality that your CRM solution might offer:

7.1 Frequently Asked Questions/Knowledge Base

Please provide more detail about the component’s following functionality:

7.1.1 A knowledge base specific to recruitment and admissions.

7.1.2 Multiple options for deployment such as website, mobile device, social media channel, customer service center desktop.

7.1.3 Knowledge base or content access can be accessed via permissions based on constituent data attributes.

7.1.4 Criteria matching engine within the knowledge base to determine inquiry resolution; operates based on customizable rules recognizing intent of question to deliver the correct answer or suggest the best possible answer.

7.1.5 Support attachments.

7.1.6 Support links to web locations.

7.1.7 Use permission roles (user types) and access levels (read only, edit, etc.) to manage the content.

7.1.8 Functional user(s) able to easily create new database entries.

7.1.9 Robust reporting/analytics used to monitor and track database use, queries, successful resolutions, geographic access, questions asked and responses given, historical use and system performance.

7.1.10 Predictive search functionality with advanced auto complete technology.

7.1.11 Built-in response ratings feature; Dynamic Top 10 questions feature based on changing timeframes.
7.1.13 Answer database & matching engine supported in various languages for full internationalization of solution.

7.1.13.1 Historical and system performance overviews in configurable charts and summary pages.

7.1.13.2 User able to rate answers, summarized in reporting.

7.1.13.3 Link validation to detect dead or broken links.

**7.2 Scripted Email Response**

Calhoun Community College’s Admissions and Advising offices currently respond manually to and track all email inquiries. We are seeking a CRM-based, integrated solution that provides a scripted, frequently used email response database to allow for consistent branding and messaging across staff members and departments/offices. Please provide more detail about the component’s following functionality:

7.2.1 Personalized responses with various data fields.

7.2.2 Branded templates.

7.2.3 Searchable canned responses.

7.2.4 Easy and quick accessibility through short cuts or search mechanism for accessing canned responses.

7.2.5 Searchable emailed responses, i.e. by subject, customer name, text, staff name.

7.2.6 Actions tracked and/or tagged against inbound and outbound email messages. Tracking must include: type of communication, contact name, time/date stamp, actual response, link to original interaction, etc.

7.2.7 Tracking and monitoring of staff response time for each email.

7.2.8 Ability to route based on subject or text in body of email.

7.2.9 Ability to include links and attachments within inbound and outbound communications.

**7.3 Other Features and Functionality**

Please detail what additional features and functionality your CRM solution offers for Recruitment, Admissions and/or Student Success. (i.e. SMS text messaging, live chat, electronic constituent gateway, phone and phone scripting, telecounseling, mobile applications, etc.)
8 Pricing

Vendor must provide a total cost of ownership for the complete CRM solution as proposed. Provide costs for years 1–5.

Be sure to include copies of your standard licensing and maintenance contracts as references, so the College may also review in conjunction with pricing. All pricing documentation should include the following breakdowns and supporting detail:

- Any associated hardware costs
- Any associated software costs; include any third party
- Any required hosting costs
- Any optional hosting costs
- Hardware maintenance and support costs
- Software maintenance and support costs
- Additional (optional) features/functionality costs
- Maintenance pricing beyond implementation, and how pricing is determined? If out of hours support is not included in the standard contract please provide the cost for this as an option.
- Costs of test, development and production instances of the CRM system, regardless of hosting model
- Costs of upgrades, if available or required
- Costs of updates/patches, if available or required
- Licensing fees (by enrollment? Seats? Other?)
- User fees (by enrollment? Seats? Other?)
- Required Interface costs
- Optional Interface costs
- Required data migration costs
- Optional data migration costs
- Set up costs
• Account/project management costs
• Implementation costs
• On-site consultation for technical and functional users
• Remote consultation for technical and functional users
• On-site Training for technical and functional users
• Remote Training for technical and functional users
• If available, Train the Trainer program
• Access to self-help information/training
• Defined technical user support (cost breakdown beyond implementation)
• Defined implementation support for technical users
• Defined functional user support (cost breakdown beyond implementation)
• Defined implementation support for functional users
• Customer Service access for questions, troubleshooting, feedback, etc.

• Note regarding proposed total cost of ownership: This “cost” will encompass the entire solution pricing along with all services and any necessary customizations. If there are additional components or modules that are not included in the offering, they must be identified and these must be itemized as “optional” and include all software costs, maintenance/support costs, hosting services costs, professional services and/or customization/integration costs/estimates, as applicable. Items not identified in the proposed solution pricing (including third party items required) will be considered part of the final solution and be considered free add-ons to the existing solution at the price included in this RFP response.

9 Vendor Qualifications

9.1 Calhoun Community College seeks to understand the qualifications of a vendor. Please demonstrate how your company and your offering provide the following:

• Solid experience with current clients using successfully functioning Higher Education CRM solutions that are interfaced with Student Information Systems. Vendors should have a minimum of five years in Higher Education.
• Solid Higher Education CRM project management, consulting and leadership experience. Must have completed a minimum of five implementations in Higher Education.

• Offer solid and responsive technical support.

• A commitment to the higher education market for at least the next five years and demonstrate this through their product roadmap.

• Stability in the marketplace.

9.2 Calhoun Community College seeks your industry insights and to understand more about your forward-looking vision of how your proposed CRM solution and any of your future product initiatives can support our competitive recruitment, admissions and advising environments. Please detail future initiatives relative to your product.

9.3 Please provide an overview of your Higher Education CRM solutions and the length of time you have provided, as well as a history of the underlying hardware/software you have provided to your clients.

9.4 Please provide a brief overview of how specifically several of your clients have contributed to the development or enhancement of features/functionality of your proposed Higher Education CRM solution.

**Evaluation Process**

Calhoun Community College will select a vendor who provides best fit and best value for the requirements and specifications of this bid. The evaluation process will be as follows:

1. **Administrative Review**
   Each bid received by the due date and time will be screened for completeness of submission.

2. **Review of Bidder Qualifications**
   Each bid remaining after the Administrative Review will be advanced for determination of whether Bidder has met the requirements of Section 9, Vendor Qualifications. Phone interviews may or may not be scheduled with vendors at the discretion of Calhoun Community College to further clarify response information.

3. **Technical Evaluation including Access, Permissions and Security Evaluation**
   Each bid remaining after review of Bidder Qualifications will advance for review and evaluation of meeting the technical specifications as detailed in Section 1, Technical Requirements and Section 2, Access and Permissions.

4. **Functional Requirements**
   Each bid remaining after review of the Technical Evaluation will advance for review and evaluation of meeting the functional specifications as detailed in Sections 4-8 of the Requirements and Specifications.

A final selection will not be made based solely on price for the software.
Presentation, Demonstration and Interview

Bidders demonstrating excellent responses to the technical and functional requirements may or may not be invited to Calhoun Community College to make a presentation and demonstration and to discuss their proposal. If such presentations are to be held, a minimum of three (3) bidders will be invited. The College will notify the bidders and schedule the time and date. The presentation will provide an opportunity for each bidder to clarify or elaborate on their proposal, but shall in no way change their original proposal. All costs associated with the bidder’s attendance at Calhoun Community College will be borne by the bidder. Calhoun Community College will evaluate presentations and select one vendor for bid award.

Important Information for Bidders:

Note: a complete bid package must include the following four items:

1. Bid pricing sheet supported by a bid response package that demonstrates compliance with each requirement of the above specifications.

2. Collusion/Fraud Statement

3. Vendor Disclosure Statement

4. e-Verify Memorandum of Understanding (entire document) as described in paragraph 17 of the general terms and conditions. If you do not believe these requirements are applicable to your entity, include an explanation justifying such exemption.
Bid Pricing Sheet
Bid #16-25

Software price:
Year 1 $_____________
Year 2 $_____________
Year 3 $_____________
Year 4 $_____________
Year 5 $_____________

Comments or other information:
_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________

NAME OF COMPANY
__________________________________

AUTHORIZED SIGNATURE
__________________________________

ADDRESS
__________________________________

PRINTED NAME
__________________________________

CITY, STATE ZIP
__________________________________

TITLE
__________________________________

TELEPHONE
__________________________________

DATE
__________________________________

EMAIL ADDRESS
__________________________________
BID #16-25
NO-BID RESPONSE FORM

NAME OF COMPANY ____________________________

AUTHORIZED SIGNATURE ____________________________

ADDRESS ____________________________

PRINTED NAME ____________________________

CITY, STATE    ZIP ____________________________

TITLE ____________________________

TELEPHONE ____________________________

DATE ____________________________

EMAIL ____________________________

FAX ____________________________

I HEREBY SUBMIT THIS AS A “NO BID” FOR THE REASONS CHECKED BELOW:

_____Insufficient time to respond

_____We do not offer the product or service requested

_____Our schedule will not permit us to respond to this bid

_____Keep our company on this bid list for future bids

_____Remove our company name from this bid list for future bids

Other (describe briefly)

______________________________________________
Collusion/Fraud Statement

I certify that I have read the General Conditions and Instructions to Bidders of the bid and this offer is made without prior understanding, or connection with any entity or person submitting a bid for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I am authorized to sign this bid for the bidder. I agree to abide by all conditions of this bid request.

____________________________________  ______________________________________
Name of Company (please type or print in ink)  Authorized Signature (sign in ink)

____________________________________  ______________________________________
Complete Address for Mailing Purchase Order and Payment  Typed/Printed Name of Signature Above

City  State  Zip Code  Title (please type)

Telephone Number  Fax Number

NOTARIZATION

Sworn and subscribed before me this the ____ day of ____________, ____.

____________________________________
Notary Public Signature

____________________________________
My commission expires (date)

MINORITY INFORMATION

If this business is minority owned please list the qualification status below:
VENDOR DISCLOSURE STATEMENT

Vendor Disclosure Statement Information and Instructions

Act 2001-955 requires the disclosure statement to be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of $5,000. The disclosure statement is not required for contracts for gas, water, and electric services where no competition exits, or where rates are fixed by law or ordinance. In circumstances where a contract is awarded by competitive bid, the disclosure statement shall be required only from the person receiving the contract and shall be submitted within ten (10) days of the award.

A copy of the disclosure statement shall be filed with the awarding entity and the Department of Examiners of Public Accounts and if it pertains to a state contract, a copy shall be submitted to the Contract Review Permanent Legislative Oversight Committee. The address for the Department of Examiners of Public Accounts is as follows: 50 N. Ripley Street, Room 3201, Montgomery, Alabama 36130-2101. If the disclosure statement is filed with a contract, the awarding entity should include a copy with the contract when it is presented to the Contract Review Permanent Legislative Oversight Committee.

The State of Alabama shall not enter into any contract or appropriate any public funds with any person who refuses to provide information required by Act 2001-955.

Pursuant to Act 2001-955, any person who knowingly provides misleading or incorrect information on the disclosure statement shall be subject to a civil penalty of ten percent (10%) of the amount of the transaction, not to exceed $10,000.00. Also, the contract or grant shall be voidable by the awarding entity.

Definitions as Provided in Act 2001-955

Family Member of a Public Employee - The spouse or a dependent of the public employee.

Family Member of a Public Official - The spouse, a dependent, an adult child and his or her spouse, a parent, a spouse's parents, a sibling and his or her spouse, of the public official.

Family Relationship - A person has a family relationship with a public official or public employee if the person is a family member of the public official or public employee.

Person - An individual, firm, partnership, association, joint venture, cooperative, or corporation, or any other group or combination acting in concert.

Public Official and Public Employee - These terms shall have the same
meanings ascribed to them in Sections 36-25-1(23) and 36-25-1(24), Code of Alabama 1975, (see below) except for the purposes of the disclosure requirements of this act, the terms shall only include persons in a position to influence the awarding of a grant or contract who are affiliated with the awarding entity. Notwithstanding the foregoing, these terms shall also include the Governor, Lieutenant Governor, members of the cabinet of the Governor, and members of the Legislature.

Section 36-25-1(23), Code of Alabama 1975, defines a public employee as any person employed at the state, county or municipal level of government or their instrumentalities, including governmental corporations and authorities, but excluding employees of hospitals or other health care corporations including contract employees of those hospitals or other health care corporations, who is paid in whole or in part from state, county, or municipal funds. For purposes of this chapter, a public employee does not include a person employed on a part-time basis whose employment is limited to providing professional services other than lobbying, the compensation for which constitutes less than 50 percent of the part-time employee's income.

Section 36-25-1(24), Code of Alabama 1975, defines a public official as any person elected to public office, whether or not that person has taken office, by the vote of the people at state, county, or municipal level of government or their instrumentalities, including governmental corporations, and any person appointed to a position at the state, county, or municipal level of government or their instrumentalities, including governmental corporations. For purposes of this chapter, a public official includes the chairs and vice-chairs or the equivalent offices of each state political party as defined in Section 17-16-2, Code of Alabama 1975.

**Instructions**

Complete all lines as indicated. If an item does not apply, denote N/A (not applicable). If you cannot include required information in the space provided, attach additional sheets as necessary.

The form must be signed, dated, and notarized prior to issuance of a purchase order.
State of Alabama
Disclosure Statement
(Required by Act 2001-955)

ENTITY COMPLETING FORM

ADDRESS

CITY, STATE, ZIP

STATE AGENCY/DEPARTMENT THAT WILL RECEIVE GOODS, SERVICES, OR IS RESPONSIBLE FOR GRANT AWARD

ADDRESS

CITY, STATE, ZIP

This form is provided with:

☐ Contract  ☐ Proposal  ☐ Request for Proposal  ☐ Invitation to Bid  ☐ Grant Proposal

Have you or any of your partners, divisions, or any related business units previously performed work or provided goods to any State Agency/Department in the current or last fiscal year?

☐ Yes  ☐ No

If yes, identify below the State Agency/Department that received the goods or services, the type(s) of goods or services previously provided, and the amount received for the provision of such goods or services.

<table>
<thead>
<tr>
<th>STATE AGENCY/DEPARTMENT</th>
<th>TYPE OF GOODS/SERVICES</th>
<th>AMOUNT RECEIVED</th>
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Have you or any of your partners, divisions, or any related business units previously applied and received any grants from any State Agency/Department in the current or last fiscal year?

☐ Yes  ☐ No

If yes, identify the State Agency/Department that awarded the grant, the date such grant was awarded, and the amount of the grant.

<table>
<thead>
<tr>
<th>STATE AGENCY/DEPARTMENT</th>
<th>DATE GRANT AWARDED</th>
<th>AMOUNT OF GRANT</th>
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1. List below the name(s) and address(es) of all public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

<table>
<thead>
<tr>
<th>NAME OF PUBLIC OFFICIAL/EMPLOYEE</th>
<th>ADDRESS</th>
<th>STATE DEPARTMENT/AGENCY</th>
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OVER
2. List below the name(s) and address(es) of all family members of public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the public officials/public employees and State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

<table>
<thead>
<tr>
<th>NAME OF FAMILY MEMBER</th>
<th>ADDRESS</th>
<th>NAME OF PUBLIC OFFICIAL/ PUBLIC EMPLOYEE</th>
<th>STATE DEPARTMENT/ AGENCY WHERE EMPLOYED</th>
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If you identified individuals in items one and/or two above, describe in detail below the direct financial benefit to be gained by the public officials, public employees, and/or their family members as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

Describe in detail below any indirect financial benefits to be gained by any public official, public employee, and/or family members of the public official or public employee as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

List below the name(s) and address(es) of all paid consultants and/or lobbyists utilized to obtain the contract, proposal, request for proposal, invitation to bid, or grant proposal:

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<th>NAME OF PAID CONSULTANT/LOBBYST</th>
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By signing below, I certify under oath and penalty of perjury that all statements on or attached to this form are true and correct to the best of my knowledge. I further understand that a civil penalty of ten percent (10%) of the amount of the transaction, not to exceed $10,000.00, is applied for knowingly providing incorrect or misleading information.

Signature

Date

Notary’s Signature

Date

Date Notary Expires

Act 2001-955 requires the disclosure statement to be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of $5,000.