REQUEST FOR PROPOSALS #20090
CUSTOMER RELATIONS MANAGEMENT SYSTEM

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Mandatory Pre-bid Conference: November 12, 2019 @ 9:00am EST

Questions will be received until: November 15, 2019 @ 3:00pm EST

Proposals will be received until: December 18, 2019 @ 3:00PM EST

REQUEST FOR PROPOSALS
CUSTOMER RELATIONS MANAGEMENT SYSSTEM
RFP #20090

SECTION 1: GENERAL INFORMATION AND STANDARD TERMS AND CONDITIONS

1.1 Purpose: To procure a Customer Relations Management System (system) to manage all forms of communication to various constituent groups for the Division of Financial Aid for the WV Higher Education Policy Commission (Commission).

1.2 Schedule of Events:

Release of RFP:	October 18, 2019
Mandatory Pre-Bid Conference:	November 12, 2019 @ 9:00am EST
Question Deadline:	November 15, 2019 by 3:00pm EST
Addendum/Response to Questions:	November 26, 2019
Proposal Due Date:	December 18, 2019 by 3:00pm EST
Target Award Date:	February 14, 2020

1.3 Vendor's Point of Contact: The sole point of contact for questions, clarification and inquiries concerning this Request for Proposal (RFP) is:

Mary Blashford, Director of Procurement
1018 Kanawha Blvd., E, Suite 700
Charleston, WV 25301
E-mail: mary.blashford@wvhepc.edu
Phone: 304-558-0281 Ext. 241 Fax: 304-558-0259

1.4 Posting of Information: This RFP and any addenda, including answers to questions, will be posted to: http://www.wvhepc.edu/resources/purchasing-and-finance/ .

1.5 Mandatory Pre-bid Conference: A mandatory pre-bid conference will be held on November 12, 2019, 9:00am EST at 1018 Kanawha Blvd., E in the 9th Floor Conference Room. All vendors submitting a bid must attend this mandatory pre-bid conference. Failure to attend the mandatory pre-bid conference will result in disqualification of the vendor's bid. No one individual is permitted to represent more than one vendor at the pre-bid meeting.

The attendance sheet provided at the pre-bid conference should include the vendor's e-mail address, phone number and fax number on the attendance sheet. It is the vendor's responsibility to locate the attendance sheet and provide the required information. Failure to complete the attendance sheet as required may result in disqualification of the vendor's bid.

All vendors should arrive prior to the start of the pre-bid conference. Vendors who arrive after the starting time but prior to the end of the pre-bid conference will be permitted to sign in.

Any discussions or answers to questions at the pre-bid conference are preliminary in nature and are non-binding. Official and binding answers to questions will be published in a written addendum to the RFP.

1.6 Questions and Answers: Questions concerning this RFP will be received in writing (via e-mail is acceptable) by Mary Blashford until November 15, 2019 at 3:00pm EST. When submitting questions by e-mail, please reference RFP 20090in the subject line. Questions received at least 5 days prior to the mandatory pre-bid conference will be discussed at the pre-bid conference. Questions and answers to discussions held at the mandatory pre-bid conference will be included in an addendum released to all vendor's attending the mandatory conference.

1.7 Addendum Acknowledgement: Changes or revisions to this RFP will be made by an official addendum issued by the Commission. Vendor should acknowledge receipt of all addenda issued for this RFP by completing the Addendum Acknowledgement section of the Proposal Title Page (Exhibit D).

1.7 Proposal Submission: Deliver an original and two (2) copies of the proposal on or before December 18, 2019, 3:00pm EST. The outside of the envelope should be clearly marked with the RFP number, the bid opening date/time and the Director of Procurement's name.

In addition, a digital copy of the proposal should be submitted; the preferred method for submission of the digital copy is by flash/thumb drive which should be included with the original bid.

Note: All cost proposals are to be submitted in a separate sealed envelope. Prices will not be revealed until the end of the technical proposal evaluation.

PROPOSALS RECEIVED AFTER THE DUE DATE AND TIME WILL NOT BE CONSIDERED. IT IS THE VENDOR'S SOLE RESPONSIBILITY TO ENSURE TIMELY DELIVERY OF THE PROPOSAL.

1.8 Proposals shall remain in effect ninety (90) days from the submission date.

1.9 Conflict of Interest: By signing the proposal, the vendor affirms that it and its' officers, members and employees have no actual or potential conflict of interest, beyond the conflicts disclosed in its' proposal. Vendor will not acquire any interest, direct or indirect, that would conflict or compromise in any manner or degree with the performance of its' services under this contract. If any potential conflict is later discovered or if one arises, the vendor must disclose it to the Commission promptly.

1.10 Independent Proposal: A proposal will not be considered for award if the price in the proposal was not arrived at independently, without collusion, consultation, communication or agreement as to any matter relating to such prices with any other offer or with any competitor. The price quoted in the vendor's proposal will not be subject to any increase and will be considered firm for the life of the contract unless specific provisions have been provided for adjustment in the original contract.

1.11 Rejection of Proposals: The Director of Procurement reserves the right to accept or reject any or all proposals, in part or in whole, at her discretion. The Director reserves the right to withdraw this RFP at any time for any reason. Submission of, or receipt by, the Director confers no rights upon the vendor nor obligates the Commission in any manner.

1.12 Expenses: The Commission will not be held liable for any expenses incurred by any vendor responding to this RFP including expenses to prepare or deliver the proposal or attend the pre-bid conference or optional oral presentation.

1.13 Interviews: Discussions and/or interviews may be held with the vendors under final consideration prior to making a selection for award; however, the RFP may be awarded without such discussions or interviews.

1.14 Oral Statements and Commitments: Any oral representations made or assumed to be made during discussions held between the vendor's representatives and the Commission personnel are not binding. Only the information issued in writing and added to the RFP by an official written addendum is binding.

1.15 Award: It is anticipated that a single contract will be awarded for this procurement. However, the Commission reserves the right to configure the contract in whatever manner is in its' best interests.

1.16 Public Record: All documents submitted in response to the RFP and any documents created as a result of this RFP are considered public record. All bids, proposals or offers submitted shall become public information and will be available for inspection during normal business hours at the Commission.

The only exception for public record is disclosure information listed in WV Code § 29B-1-4. Primarily, only trade secrets are considered exempt from public disclosure. Information noted as a trade secret that does not meet the requirements as set forth in WV Code § 29B-1-4 will be considered public information.

1.17 Contract: The RFP and the vendor's response will be incorporated into the contract by reference. The order of precedence is the contract, the RFP and any addendum and the vendor's proposal in the response to the RFP.

1.18 Contract Term: This procurement is for the development of a Customer Relations Management System. Once this system is developed for the Commission, it is our intent to continue the system's use until the Commission chooses to replace the system. The development portion of the contract will be effective upon award and shall extend for the period required for system completion. After system development a separate contract for system usage and/or maintenance costs will be negotiated and agreed upon by both parties annually.

1.19 Contract Changes: Any changes to the original contract will be made via a Change Order issued by the Commission. No change is official until a signed Change Order is produced.

1.20 Contract Termination for Unavailability of Funds. If funds are not appropriated or allocated for the services provided under this contract, the Commission may terminate the contract at the end of the affected current fiscal period without charge or penalty. The Commission shall give the vendor written notice of such non-appropriation or non-allocation of funds as soon as possible after the Commission receives notice.

1.21 Contract Termination for Failure to Perform: The Commission may terminate the contract resulting from this RFP immediately at any time the vendor fails to meet the terms of the contract.

1.22 Payment of fees will be made upon successful completion of the required services. Progress payments for services satisfactorily completed may be made pursuant to a payment schedule developed and agreed to by both the Commission and the vendor.

1.23 Invoices: The vendor shall submit invoices, in arrears. State law prohibits payment of invoices prior to receipt of services. State law does not provide for interest payments on late payments. Invoices properly prepared and submitted in accordance with the terms and conditions of the contract are usually paid within thirty (30) days.

1.24 Governing Law: This contract shall be governed by the laws of the State of West Virginia.

SECTION 2: ELIGIBILITY REQUIREMENTS

2.1 Vendor Registration – WV Code § 5A-3-12. The West Virginia Code requires that all vendors be registered with the WV Department of Administration, Purchasing Division, prior to receiving a purchase order for competitive products and/or services exceeding $25,000. See Exhibit A.

2.2 Debarment – WV Code §5A-3-33 through §5A-3-33F. Vendors that have been debarred by the federal government are not eligible to offer on or receive contracts to supply goods or services to the state and its subdivision for a specified period of time.

2.3 West Virginia Secretary of State. The vendor must be in compliance with the Secretary of State and should provide a copy of their business license with the proposal. For more information, contact the WV Secretary of State.

2.4 Taxpayer Identification Information. The Internal Revenue Service (IRS) requires the Commission to request a taxpayer identification number (TIN) for tax reporting purposes. IRS Form W9 is used to obtain this information. See Exhibit B.

2.5 Purchasing Affidavit – WV State Code §5A-3-10a requires all vendors to submit an affidavit regarding any debt owed to the State. The Affidavit (Exhibit C) should be completed, signed and returned with the vendor's proposal.

2.6 RFP Response Title Page – The Title Page includes the RFP Number, Addenda Received check boxes, the Vendor's business name, business address and telephone number, a contact name and e-mail address and includes a signature line and date for the individual authorized to obligate the business. See Exhibit D.

SECTION 3: BACKGROUND INFORMATION

The Division of Financial Aid for the West Virginia Higher Education Policy Commission processes over $100 million in state financial aid annually. The Division of Financial Aid communicates eligibility and award information to over 30,000 students for eight different financial aid programs. The Division of Financial Aid also works with over 100 high schools throughout the state and over 40 institutions of post-secondary education. The Division of Financial Aid is seeking a system to be able to manage all forms of communication to each constituent group.

SECTION 4: SCOPE OF SERVICES

4.1 Mandatory Required Features

FAILURE TO MEET THE FIVE CRITERIA BELOW WILL RESULT IN DISQUALIFICATION OF THE VENDOR'S BID.

a) The Customer Relations Management (CRM) system must provide the ability to view an overall history of a contact, preferably on a single screen, for internal staff to use when interacting with contacts. That screen must contain application and award information as well as any communications with that contact. Staff must have the ability to make notes of any communications with a contact.

b) The CRM system must be able to display, preferably on a single screen, eligibility for all programs associated with the student that are determined from multiple database tables.

c) The CRM system must able to integrate with the Commission's existing Oracle database system.

d) Vendor must show evidence of compliance to federal data protection laws related to educational data including but not limited to the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) and its impending regulations, the Higher Education Act (HEA), and the Gramm-Leach-Bliley Act (GLB Act or GLBA).

e) All data must remain in the United States.

f) Must provide security mechanisms for handling data at rest and in transit in accordance with FIPS 140-2 encryption standards.

4. 2 General Requirements

a) Please explain how your CRM system is able to manage all forms of communication both incoming and outgoing with multiple constituent groups.

    a. Describe how the CRM system can create and maintain contacts and what features are available in managing contacts within the CRM system.

b) Do you offer a Computerized Telephony Integration (CTI) that integrates with leading telephone network hardware and software?

c) Is your product able to support screen pops based on automatic number ID (ANI) or Interactive Voice Response (IVR) hardware and software?

d) Is your CRM solution accessible via the web with no software to download or hardware to install?

e) Is your CRM system able to track workflow and automatically assign tasks to the right individual?

    a. Does the CRM system provide alerts based upon key events or if tasks have not been completed?

f) Does the CRM system create tickets based upon incoming communications that are assigned based upon rules that can be changed and updated?

    a. Does the CRM have an alert management when tickets are not responded to in a timely fashion?

g) Describe how the CRM system integrates with Outlook.

h) Does the CRM system send HTML emails, in addition to sending emails via Outlook?

i) Can the CRM system create e-mail templates that can easily merge data from existing database tables and support attachments for sending forms?

j) Does the CRM system have capability of sending and receiving text messages and managing those communications?

k) Describe the process of managing outgoing communications and putting contacts on communication tracks to receive automatic communications based upon certain criteria and the process for adding or deleting a contact from a communications track.

    a. Explain how the CRM system develops communication campaigns.

    b. Can the CRM identify and track applicants at different stages of an application cycle?

l) Describe the how communication tracks are created and managed within the CRM system, including how contacts would be added and deleted from a communication track. Also explain the steps of how a communication from a communication track is processed.

m) Does the CRM system allow users to search for records based upon multiple fields (ex. student ID, First name, last name, e-mail address, date of birth, etc.)?

n) Describe the user interface. Is it customizable per user?

o) Describe how dashboards are created and viewed within the CRM system.

p) Is the CRM system able to link activities, documents, communications to contacts, accounts, etc.? For example, if we have a financial aid workshop, can we link it back to a particular high school and track which high schools have had workshops and which ones have not? Or if there is a training, are we able to tell not only who went to the training but also summarize as to how many from each institution attended the training and which institutions did not have anyone attend? Or, can we attach invoices to each institution?

q) Does the CRM have the ability to support an online chat that is integrated into a public site or student portal?

r) Does the CRM provide surveys that can be used to gather information from contacts after a training or resolution of a case or inquiry?

s) What is the speed for reports, search, lookups, edits, and navigating through the CRM?

t) Does the CRM system have a sandbox or test environment?
    a. Explain the process of deployment from sandbox to production.

u) Is there a maximum number of concurrent users the system will support?

4.2 Student Portal

a) Does the CRM system include a portal that allows for single sign on and authenticates using new or existing login credentials as appropriate?

b) Can the portal use two-factor authentication?

c) Is the portal mobile-responsive?

d) Is the portal compatible with various browsers and mobile devices?

e) Can the portal be branded and personalized with content for individual students?

f) Can the portal allow students to check the status of an award, make edits to an application, submit forms, support an online chat, update profiles or demographic information, and send direct message to the appropriate program administrator?

g) What is the process for password resets, locked accounts, process if a student forgot their username/password?

h) Are there any other features to the portal that have not been addressed?

i) Is there a maximum number of users that the system will support, with the ability to scale higher in the future?

4.3 Security

a) Explain the security of your system.

b) What security features are included with the CRM system based upon the user, field, record, screen access, etc.

c) Does the CRM require scheduled maintenance?

d) What is the average CRM system up time? Are there scheduled down times or times when the CRM would be unavailable?

e) Provide details of any independent security audits that have been performed on your product.

f) Provide an overview of your security controls.

g) What is the capability of encrypting data?

h) What is the ability to manage encryption keys?

i) Does the system offer local data and file storage or is it cloud-based? If it is cloud-based respond to the following:
    a. What is the security and protection of your facilities if data is stored on your servers?
    b. Do you have disaster recovery plans in place for your server's physical location?
    c. What is your backup schedule and where do you back-up to?

4.4 Reports

a) What are the reporting capabilities with the CRM system?

b) Are all reports real-time?

c) Describe how custom reports are built and run within the CRM system.

d) Does the reporting function allow for users to schedule an execution time and automated delivery of reports to other users?

e) Can users refresh a report and get real time, up-to-the-minute data?

f) What are the capabilities of the CRM in generating graphs and charts or graphical views of our application showing where applicants may be at different stages of the process? Can we see how many are at each stage in the process? For example, with WV Invests, how many have applied, of those applicants, how many have been determined to be eligible? How many are eligible and have a drug screen test completed? How many have the drug screen and signed a promissory note, etc.?

g) How are analytics and predictive modeling used in either the CRM or in the reporting?

h) Are reports capable of drilling down to the underlying data of the report?

   a. Can the ability to drill down in a report be restricted based upon permissions?

   b. Is there the ability to add security and encryption to the data when drilling down the report? For example, can personally identifiable information (PII) data be masked or hidden or can we restrict access to PII based upon permission granted at an administrative level?

4. 5 Support

a) What type of assistance and support is provided for free? What assistance and support is available at an additional cost?

b) What resources or training is available through an online library or through pre-recorded videos that can be accessed 24/7/365?

c) Explain how upgrades are done, how often, and can they cause customizations to stop working?

d) Can the production environment be cloned for testing new features prior to rolling out into production?

4.6 Ease of Administration

a) Explain the ease of use for the following:

   a. System set-up

   b. Annual updates

   c. Navigating the system

   d. Administrator - setting permissions, rules, and workflows

   e. Creating surveys

   f. Creating records

g. Updating records
h. Creating dashboards
i. Creating reports
j. Setting up notifications for contacts via e-mail or text.
k. Creating forms to collect information from contacts that can be sent either via e-mail or posted on a portal
l. Creating custom fields
m. Creating calculated fields

b) Can the CRM system be expanded and customized by the user without the help of IT staff or without having to pay additional fees?
c) Does the CRM system require a person with an IT background in order to make changes or customizations to the CRM system?
d) Discuss how the CRM system can prevent duplication of accounts or contacts and how the CRM system deals with correcting any duplicates.
e) Describe the process for developing an e-mail or text notification to a single contact or multiple contacts.
f) Does the CRM have keyboard shortcuts and macros to execute a multi-step process to make processing more efficient?
g) Can the CRM integrate with other software, applications, or third-party solutions such as Microsoft office products, Adobe, etc. for software, social media and the ability to manage communicating through those applications? We are currently using Campus Logic, Ocelot (FATV), ECSI (Heartland) for award letters, chatbot, and collections. Can your system integrate with the third parties we are currently using?
h) Explain the process for importing or exporting data on demand.

SECTION 5: VENDOR INFORMATION AND QUALIFICATIONS

Provide a statement/response to each of the following:

5.1 Provide a statement of qualifications of individuals to be assigned direct responsibility for the services.

5.2 Describe the experience that key personnel have, their length of service with the firm, as well as other relevant skills.

5.3 Describe the Firm’s size, illustrating its ability to fulfill the terms of the RFP.

5.4 Describe any related experience.

5.5 Provide a complete description of how the work will be conducted including all quality assurances that are provided in the firm's process for this type of work and detail the amount of time and effort that will be required of the entities' personnel. Include in this description an explanation of the tools/technology used to collect/coordinate requested items.

5.6 Provide a proposed implementation schedule that ensures completion of the services and illustrate, by timeline, the expected milestones and end date.

5.7 Provide the names, telephone numbers and mailing addresses of at least three higher education clients and the contact person from whom references may be obtained for both the firm and the key personnel assigned to the engagement. References should be from clients comparable to the type and scope of services solicited in this RFP.

SECTION 6: VENDOR RESPONSE AND EVALUATION CRITERIA

6.1 Economy of Preparation: Proposals should be prepared simply and economically, providing a straightforward, concise description of the vendor's ability to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

6.2 Proposals should be limited to forty (40) pages. Additional material may be presented as exhibits to the main proposal.

6.3 A Title Page (Exhibit D) should be provided. The Title Page is the preferred method of providing the vendor's information. If the vendor does not utilize the Title Page, the bid must provide a cover letter with, at a minimum, the signature of an individual authorized to obligate the company and a date.

6.4 The proposal will be evaluated on a one hundred (100) point scale with points assigned as outlined below.

6.4.1 Qualifications, Experience and Company Background – 30 points

Responses to Section 5 will be reviewed and evaluated here.

6.4.2 Services – 40 points

Responses to Section 4 will be reviewed and evaluated here.

6.4.3 Price – 30 points

Attachment 1 – Vendor Cost Sheet should be used to summarize all costs associated with your bid. This Cost Sheet and any attachments will be used in the evaluation of the vendor's bid cost.

The low bid will receive the full 30 points. Each higher bid will receive a percentage of the 30 points on a ratio basis compared to the low bid cost.

NOTE: ALL PRICES ARE TO BE PROVIDED IN A SEPARATE SEALED ENVELOPE LABELED AS PRICING INFORMATION. FAILURE TO SEPARATE COSTS FROM THE PROPOSAL MAY BE CONSIDERED GROUNDS FOR DISQUALIFICATION.

6.5 Award will be made to the vendor receiving the highest point total.

6.6 In the event that mutually acceptable terms cannot be reached within a reasonable period of time with the highest ranked vendor, the Commission reserves the right to undertake negotiations with the next highest ranked vendor and so on until mutually acceptable terms can be reached.

SECTION 7: ADDITIONAL INFORMATION

7.1 By submitting a proposal in response to this RFP, a firm shall be deemed to have accepted all the terms, conditions, and requirements set forth in herein unless otherwise clearly noted and explained in writing in the vendor’s response. Any exception(s) or additional terms and conditions a firm wishes to offer for consideration must be clearly itemized and explained. Otherwise, the RFP in total shall be incorporated into the contract by reference. The Commission may accept or reject the Firm's proposed exceptions as it deems appropriate and in the best interests of the Commission.

7.2 The State's Agreement Addendum (WV-96) is attached to demonstrate state law and guidelines which must be adhered to in any contract presented to the Commission for execution (See Exhibit E). A copy of additional terms and conditions that a firm wishes to offer for consideration should be enclosed with the proposal.

THE WV-96 IS PRESENTED FOR INFORMATIONAL PURPOSES ONLY. THE VENDOR SHOULD NOT SIGN AND RETURN THE FORM WITH THE BID.