



MASSACHUSETTS COLLEGE OF LIBERAL ARTS

REQUEST FOR PROPOSALS

for

Admission CRM

(Customer Relationship Management) Software

Issued by:

Massachusetts College of Liberal Arts

The Office of the Vice President, Administration & Finance

RFP 2023-002

December 26, 2022

Proposals due on February 1, 2023, by 2:00 PM (EST)

OVERVIEW

Since our inception as the Normal School in North Adams in 1894, Massachusetts College of Liberal Arts (MCLA) has provided educational access and exceptional learning opportunities to generations of students and alumni.

In addition to our 127-year commitment to public education, we have fortified our commitment to equitable academic excellence. For 10 of the last 12 years, MCLA has been named a Top Ten College by U.S. News and World Report. MCLA also appears on the organization's list of top National Public Liberal Arts Colleges and has risen to #21 as a Top Performer on Social Mobility and first among all Massachusetts schools, which measures how well schools graduate students who receive Federal Pell Grants.

MCLA has a total enrollment of just over 1,400 students with nearly 340 graduate and post-baccalaureate students. MCLA offers 23 undergraduate majors, three graduate degrees, and four-degree completion programs.

At MCLA, we are here for all – and focused on each – of our students. Classes are taught by educators who care deeply about teaching and about seeing their students thrive on every level of their lives. In every way possible, the experience at MCLA is designed to elevate our students as individuals, as leaders, and as communicators, fully empowered to make their impressions on the world.

SCOPE

MCLA seeks responses from experienced vendors who can provide project planning and execution of a CRM (Customer Relationship Management) implementation. This CRM should provide the tools necessary to enable MCLA to improve how it manages resources, services, and service management and project portfolio process in a manner that is consistently reliable, transparent, sustainable, and measurable. The vendor will provide expertise required to complete a successful implementation and will share knowledge and deliver training to appropriate resources at the College.

REQUIREMENTS

Security, Support & Service

- Ability to provide client with the migration of all appropriate existing data necessary for rollout of new CRM.
- Data retention and export capabilities.
- CRM can provide East Coast business day customer support.
- CRM is fully Cloud Based. (Vendor must provide reasonable maintenance schedule and sufficient availability for enterprise application.)
- CRM allows for multiple user roles, with varying levels of access to the system as appropriate.
- CRM is mobile friendly and allows for students to access accounts and submit applications from a mobile device.
- CRM meets ADA compliance requirements (e.g., WCAG).

Data & Communication

- CRM has native analytics (either through delivered reports or dashboards) and allows for customized reports to be built and access to data as needed.
- CRM includes tools for managing clients through the entire lifecycle – from pre-to post-event. For example, event registration module and the ability to send and receive event related emails and text messages/create email templates for messaging related to event life cycle.
- CRM has full unlimited email capabilities, including the ability to create and send HTML emails (and attachments) natively through the system (without use of 3rd party solution).
- CRM has text-messaging capabilities, with no limit to the number of messages sent.
- Students must have the option to opt in or out of SMS (Short Message Service) text messaging.
- Ability to communicate and follow up with prospective students and various cohorts.
- Ability to add preferred name, gender, and personal pronouns.
- Capable of handling minimum of 7,000 applications (cumulative) per year.
- Ability to accommodate different constituencies across campus, including but not limited to, undergraduate, part-time/evening, and graduate offices.

Common App Integration

- Ability to provide seamless integration and oversight with The Common Application.
- Bid should include document management capabilities and ability to be compatible with leading higher education document management systems that have proven integration with the proposed solution OR
The bid should include the ability to manage and retrieve documents electronically.
- Ability to provide seamless integration of all back-end data functions without a third-party vendor to ensure real-time solutions in implementation.

Ellucian Banner Integration

- CRM has a current and proven integration with Ellucian Banner. (Preference given to solutions that support real-time integration; bid should include description of the integration.)
- Bid should include information on Credit Card payment collections and integration with Ellucian Banner.
- Ability to provide seamless integration of all back-end data functions without the use of third-party vendors to ensure real-time solutions in implementation.

EVALUATION CRITERIA

A Selection Committee will meet to review the Proposals submitted in response to this Request for Proposal. The Request for Proposals does not commit MCLA to award a contract or to pay any cost incurred in the preparation of the proposal. The College reserves the right to select any proposal it deems in its best interest. Further, the College may accept or reject any or all proposals received and waive any formalities in the evaluation process. The College may also cancel the RFP process if it is deemed in their best interest. Criteria to be used in the evaluation process includes but is not limited to a rating system for the evaluation of the criteria under the following categories. A rating system of Highly Advantageous (Yes response), Advantageous (Future response), Not Advantageous (No response) will be used when reviewing technical proposals. When selecting "Future" please provide an estimated time frame for implementation.

Price shall not be the only factor when making award decision. The factors to be considered by the College, in evaluating proposals and selecting the successful bidder, shall be those factors listed and categorized below with their relative weightings.

Pricing proposals will be opened after the review and rating of the technical proposals is completed. The College will select the company offering the best value to the College, not necessarily the lowest price.

	Highly Advantageous	Advantageous	Not Advantageous
Answers to Questions	Yes	Future	No
Contract Length	3-year contract with option for up to three 1-year extensions	3-year contract with option for 1 year extension	3-year contract only
Professional Services	Implementation provided by proposer, or a choice provided by a number of partners.	Choice provided by a number of partners of which MCLA can choose.	No ability to choose implementation partner or project lead.

1. Functional			
a. Current and proven direct, automated integration with The Common Application. (Please describe)	Yes	Future	No
b. CRM has a current, proven, direct, and automated test-score integration for both College Board and ACT. (Please describe)	Yes	Future	No
c. CRM supports Credit Card payment for application and enrollment fees. TouchNet integration is preferred, and associated costs must be included in the quotation. (Please describe)	Yes	Future	No
d. Ability to host a custom admission application. (Please describe)	Yes	Future	No
e. Ability to provide customized fulfillment services for print material, such as personalized postcards. (Please describe)	Yes	Future	No

2. Technical Specifications			
a. CRM has a testing environment available for College to utilize, independent of production environment. (Please describe)	Yes	Future	No
b. CRM provides online help, forums, and direct support available, as well as onboarding process and training. (Please describe)	Yes	Future	No
c. User licenses are provisioned campus-wide; charges do not apply for additional licenses. (Please describe)	Yes	Future	No
d. CRM allows for custom data fields, with a current and proven integration with Ellucian Banner. Custom data should be able to be migrated into Ellucian Banner. (Please describe)	Yes	Future	No

3. Communications			
a. Ability to personalize and send admissions acceptance letters/documents via email or text with attachments. (Please describe)	Yes	Future	No
b. Ability to track inbound and outbound prospect and applicant contacts. (Please describe)	Yes	Future	No
c. Ability to track applicants who have not enrolled in the college. (Please describe)	Yes	Future	No
d. Ability to track enrolled students who are no shows. (Please describe)	Yes	Future	No
e. Ability to send communications to students who have not a submitted FAFSA. (Please describe)	Yes	Future	No
f. Ability to communicate to Financial Aid applicants who have missing documents, academic progress issues, and student billing issues. (Please describe)	Yes	Future	No
g. Ability to communicate to students that submitted a FAFSA but have not submitted a MCLA application. (Please describe)	Yes	Future	No
h. Ability to integrate financial aid literature. (Please describe)	Yes	Future	No
i. Ability to customize application for no institutional functionalities. (Please describe)	Yes	Future	No
j. Supports and integrates ALL data in real-time. (Please describe)	Yes	Future	No

4. Online Admission Applications			
a. Provide the ability to allow all students to apply to the college regardless of cohort selective programs, international applicants, dual enrollment, home schooled, returning applicants, visiting students, etc.). (Please describe)	Yes	No	Future
b. Ability to link web pages to online admissions applications. (Please describe)	Yes	No	Future
c. Ability to gather applicant persona. (demographics, creativity, introvert, extravert, etc.) (Please describe)	Yes	No	Future
d. Ability to add emergency contact information. (Please describe)	Yes	No	Future
e. Ability to add new data fields and edit them. (Please describe)	Yes	No	Future
f. Ability to customize all forms. (Please describe)	Yes	No	Future
g. Review incomplete Admissions applications. (Please describe)	Yes	No	Future

5. Data Integrity			
a. Ability to prevent the creation of duplicate student ids. (Please describe)	Yes	No	Future
b. Ability to create customizable and scalable executive dashboards.(Please describe)	Yes	No	Future

6. Integration			
a. Integrates with SIS (Student Information System) Ellucian Banner. (Please describe)	Yes	No	Future
b. Integrates with the college’s public-facing website. (Please describe)	Yes	No	Future
c. Includes and integrates with third-party authentication. (Please describe)	Yes	No	Future
d. Integrates with Banner Ellucian APIs (Application Programming Interface). (Please describe)	Yes	No	Future
e. Integrates with the college’s student portal (MyMCLA). (Please describe)	Yes	No	Future
f. Integrates mobile friendly technology with responsive design. (Please describe)	Yes	No	Future
g. Supports SSO (Single Sign On). (Please describe)	Yes	No	Future
h. Supports customization of web forms. (Please describe)	Yes	No	Future
i. Supports customization of communication functions. (Please describe)	Yes	No	Future
j. Integrates with document imaging application. (Please describe)	Yes	No	Future
k. Integrates with the College’s data warehouse. (Please describe)	Yes	No	Future
l. Integrates with reporting applications such as Argos and/or Tableau. (Please describe)	Yes	No	Future
m. Integrates with IPAS (Integrated Planning and Advising Solution) such as EAB Navigate. (Please describe)	Yes	No	Future

7. Technical Infrastructure

Please describe the technical infrastructure of your product and cover the following topics, as appropriate:

- Describe baseline data model of the product
- Identify client operating systems that are supported
- Identify client hardware requirements
- Identify any third-party software required
- Need for data dictionary
- Requirements for system administration and remote access to the network/application
- Identify use of test environment(s) and integration with test environment of College's SIS, Ellucian Banner
- Supported browser(s) and changes to browser upgrades / revisions
- Identify product's data architecture
- Identify integration strategy of various vendor product modules
- Identify enterprise job scheduling tool(s).

PROCESS SCHEDULE

Request for Proposal Issued	Monday, December 26, 2022
Vendor Questions Deadline	Friday, January 13, 2023 @ 5 PM EST
Responses to Vendor Questions	Wednesday, January 25, 2023 @ 5 PM EST
Submission of Proposals Due	Wednesday, February 1, 2023 @ 2 PM EST
Evaluation of Responses	Thursday, February 2 – Friday, February 17, 2023
Anticipated Contract Awarded	Wednesday, February 22, 2023
Contract Start Date	March 2023

RFP SUBMISSION INSTRUCTIONS

Expression of Interest

If your company is considering submitting a proposal in response to this RFP, please email william.norcross@mcla.edu of your intent to participate. Please include in your email:

Your Name
Title
Company Name
Telephone Number
Email Address
Fax Number

Submission of your interest is not a prerequisite for submitting a proposal, but it is necessary to ensure future communication regarding this RFP.

All communication regarding this Request for Proposal shall be directed to William Norcross, Purchasing Manager – Administration and Finance. He can be reached at william.norcross@mcla.edu. Failure to follow this instruction shall result in immediate disqualification of the interested party.

Questions and inquiries should be emailed to william.norcross@mcla.edu and must be submitted by January 25, 2023, no later than 5:00 pm. The subject line should be Admission Customer Relationship Management Software RFP 2023-002. Any oral communication shall be considered unofficial and non-binding on the College. Written responses will be copied to all respondents submitting an expression of interest.

As a public institution, we are subject to all State and Federal regulations regarding the release of public records and information.

SUBMISSION REQUIREMENTS

- **Itemized Cost Schedules:** Include an itemized cost schedule for one, three, and five years that includes the following:
 - All prices submitted must be stated as firm fixed price. Prices will remain fixed for the entire contract.
 - Please include an hourly rate fee schedule (price per component and hour and numbers of hours where applicable).
 - List examples of cost itemization (if applicable)
- **List of References:** Provide a point of contact (including email and phone number) for 3 current clients in higher education for whom you have provided similar services. Please include a brief description of the school and the project's complexity (preferably Ellucian Banner schools). MCLA may deem the bidder's response unresponsive if a reference is not obtainable after reasonable attempts.
- **Typical Implementation Process and Time Frame:** In narrative form, briefly describe a typical implementation process and time frame for the installation, integration, and training for our product and/or services.
- The proposal must be signed by an official authorized to bind the vendor to its provisions and must remain valid for at least 120 calendar days from the deadline for proposal submission.
- Certification of Non-Collusion must be signed and submitted with proposal. (See page 15)
- Late proposals will not be considered.

SELECTION PROCESS

A Selection Committee will meet to review the proposals submitted in response to this Request for Proposals. Each proposal submitted must be signed by an institution official authorized to bind the offer. The solicitation for proposals does not commit Massachusetts College of Liberal Arts to award a contract to pay any cost incurred in the preparation of the proposal. The College reserves the right to select any proposal it deems in its best interest. Further, the College may accept or reject any or all proposals received and waive any formalities in the evaluation process.

Criteria to be used in the evaluation process include, but are not limited to, the following:

- The greatest value with respect to the bidder's response, and its material content and responsiveness to the requirements of this RFP.
- The quality of services offered.
- The general reputation of the firm.
- The qualifications of the personnel assigned to work on the project.
- The demonstrated understanding of the respondent of conducting the work as required by the service's scope.
- The bidder's functionality, performance, flexibility, and ability to meet the goals of MCLA.

The College, at its discretion, may request responding vendors to make oral presentations. The College will schedule the time and location if a presentation is deemed necessary.

CONTRACT

The contract term shall be for three years with the possibility of two annual renewals at the discretion of the College for a maximum of five years. The implementation date shall be as soon as practical. The College may negotiate such additions, deletions, or changes as may be necessitated by law or changed circumstances. The successful respondent is encouraged to present new or enhanced products and services for consideration by the College during the Agreement's life.

The College reserves the right, in its sole discretion, to terminate the contract that results from this RFP with thirty (30) days written notice to the successful company should the Agreement no longer be deemed beneficial to the College.

State law prohibits the College from agreeing to indemnification of the contracted party. Additionally, it is mandatory that the Commonwealth of Massachusetts laws apply to the performance of the contract and that jurisdiction and venue be in Boston, Massachusetts for State and Federal courts.

Vendors That Win an Award Must Sign the following:

Exhibit A– Commonwealth of Massachusetts Standard Contract Form

Exhibit B - Commonwealth Terms and Conditions document

Exhibit C - Commonwealth Terms and Conditions for Information Technology Contracts

Exhibit D - Northern Ireland Notice and Certification

Exhibit E - State Tax Compliance

Exhibit F - Massachusetts College of Liberal Arts W9 Form

Choice of Law

The laws of the Commonwealth of Massachusetts, without giving effect to its conflicts of law principles, govern all matters arising out of or relating to this Contract and all the transactions it contemplates, including, without limitation, its validity, interpretation, construction, performance, and enforcement. The Contractor agrees to bring any federal or state legal proceedings arising under this Contract in which the Commonwealth or the College is a party, in a court of competent jurisdiction within the Commonwealth of Massachusetts. This paragraph shall not be construed to limit any other legal rights of the Parties. The terms in this proposal will take precedence over any vendors submitted in response to this RFP. If the College cannot agree to contract terms with the vendor(s) that win an award, then the College reserves the right to move the award to another vendor.

Force Majeure

Neither party shall be liable to the other or be deemed to be in breach of this Contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include, but are not limited to, acts of nature or of a public enemy, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, or unusually severe weather.

Dates or times of performance shall be extended to the extent of delays excused by this section, provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay.

Proposal Costs

Expenses incurred by the vendor in preparation of proposals are the vendor's responsibility.

Termination of Agreement

The College may terminate this Contract if Contractor breaches any material term or condition stated herein or fails to perform or fulfill any material obligation required by the Contract, including; but not limited to (1) Vendor's failure to provide product(s) as required in this Contract; (2) any of the rights granted to College herein are materially restricted or limited during the Term of this Contract; (3) a final judicial order, opinion, or governmental regulation prohibits the availability of device(s), whether or not due to a cause beyond the reasonable control of the Vendor; (4) labor disputes between the Vendor and its employees, or a union results in the picketing of, or a work stoppage by, Vendor's employee(s), agents, or suppliers; (5) Vendor fails to act as an equal opportunity employer with an affirmative action plan during the term of this Contract; (6) if in the sole judgment of the College, the College receives an excessive number of complaints about the Vendor's products (s) or services.

In the event of breach of this Contract by Vendor, the College may terminate this Contract by giving written notice to the Vendor at least thirty (30) calendar days before the effective date of termination stated in the notice. The notice shall state the circumstances of the alleged breach and may state a period during which the alleged breach may be cured, which cure shall be subject to approval by the College.

If the notice provides a cure period and the Vendor fails to cure the alleged breach within the period stated in the notice, the College may terminate this Contract without penalty upon seven (7) days written notice to the Vendor.

Notwithstanding, if such failure or delay in rendering performance is more than thirty (30) days, the College may, at its discretion, terminate this Agreement without penalty or recourse, by providing written notice to Vendor.

Payment Terms

The College's payment terms are Net 30 days from the date of receipt of all submittals, in accordance with Section 9, with late penalty interest assessable at rates established by the Commonwealth, after 45 days, in accordance with M.G.L. C29, s29C, and with Commonwealth Regulation 815 CMR 4.00. Funds are authorized for goods, services and other obligations incurred, received and accepted in the current fiscal year and may not be used to pre-pay for future fiscal year obligations (advance payments) even if substantial discounts are offered, without specific legislative authorization or for prior fiscal year obligations. See G.L. c.29, § 12. This means goods and services to be paid for with current fiscal year appropriations must be received within the fiscal year (July 1-June 30).

Severability

If any provision of this Contract is declared or found to be illegal, unenforceable, or void, then both Parties shall be relieved of all obligations under that provision. The remainder of the Contract shall be enforced to the fullest extent permitted by law.

Assignment and Delegation

The Contractor shall not assign or in any way transfer any interest in this Contract without the prior written consent of the College, nor shall the Contractor subcontract any service without the prior written approval of the College. Any purported assignment of rights or delegation of performance in violation of this Section is VOID.

Acceptance & Rejection of Proposals

College is not obligated to accept any proposal and Nothing within the RFP shall be taken as constituting a contract or agreement. In addition, College reserves the right to:

Make all decisions regarding this proposal, including, without limitation, the right to decide whether any proposal does or does not substantially comply with the requirements of the RFP.

Accept, reject, or negotiate modifications to any terms of proposals received. Communicate with the vendors, individually or collectively, formally, or informally. Reject any or all proposals received.

Additional Rights Reserved

In addition to all other rights, College specifically reserves the right to:

Select and negotiate with those parties it judges qualified for competitive bidding and terminate negotiations without incurring any liability.

Accept or reject all or part of a bidder's proposal or accept no proposal at all.

Negotiate various terms and other conditions of business with the successful bidder(s).

Contact any bidder to obtain corrections or clarifications to a submitted proposal if necessary to make a fair comparison of all proposals submitted.

Extend the proposal submission date for all bidders, if it is determined to be necessary for any reason.

Amend or supplement this RFP in writing at any time.

CERTIFICATION OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.

(Signature of individual submitting bid or proposal)

(Name of Business)