

REQUEST FOR PROPOSALS
Constituent Relationship Management (CRM Solution
For
PIERPONT COMMUNITY & TECHNICAL COLLEGE

PIERPONT COMMUNITY & TECHNICAL COLLEGE
500 GALLIHER DRIVE, ROOM 201c, FAIRMONT, WV 26554

RFP Issued: July 15 2021

RFP Due: August 18 2021

Submit Response To: **David Williams**
Director of Procurement
Pierpont Community & Technical College
500 Galliher Drive, Room 200L, Fairmont, WV
26554

Questions/Clarifications The College respectfully requests that respondents refrain from questions or inquiries during the RFP process. If, however, you need to do so, please direct these questions via email to:

David Williams, Director of Procurement

Dwilliams29@pierpont.edu

By way of this Request for Qualifications/Request for Proposals RFP, Pierpont Community & Technical College (PCTC) will be considering proposals to provide a CRM software as a system for managing interactions with prospective, current undergraduate students, alumni, faculty, staff and other essential constituents from qualified companies. Company. marketing, reporting and analysis needs. Company

The purpose of this RFP is to obtain information that will enable Pierpont Community & Technical College to select, with respect to such services,. The CRM will synchronize business processes, operations, communications, marketing Constituent service and reporting among the campus offices and departments charged with finding and attracting and enrolling new students, as well as servicing and retaining students already attending Pierpont Community & Technical College and finally alumni. Company. Each Company responding to this RFP should be prepared and equipped to provide full service to the College in an expeditious and timely manner and on relatively short notice to enable the College to meet critical time deadlines and schedules.

If your Company/Organization is interested in providing services as outlined herein in the Scope of Services section, on behalf of the College, please submit to the College a detailed summary of your Company/Organization's qualifications in accordance with this RFP ("Response"). The deadline for receipt of all materials responsive to this RFP is **August 18, 2021, at 3:00 pm** (the "Response Deadline"). Note that Responses delivered after the Response Deadline may not be considered. Responses will be date stamped to record receipt thereof. The Responses may be mailed or delivered in person during normal business hours, which are 8:00 am to 4:00 pm, Monday through Friday. The delivery of RFPs is the sole responsibility of the business/organization. All Responses must be signed and become the property of the Pierpont Community & Technical College. The address for submission is:

David Williams
Director of Procurement
Pierpont Community & Technical College
500 Galliher Drive, Room 200L, Fairmont, WV 26554

Each is required to submit a Response they deem appropriate to the following requests. Submittals should be brief and concise but provide sufficient clarity to meet the criteria used in the evaluation process. Company Respondents must read the entire RFP prior to submitting questions, as most questions will be answered in this RFP. Please refrain from asking questions regarding the formatting of this RFP. DO NOT contact Student Services or other Departments at the College. All inquiries should be sent via email to the noted party herein.

By tendering a Submittal, the Respondent acknowledges that it is willing to provide complete services in any of the areas specified as described herein, including labor and other services, as reflected in the Scope of Work Section for the benefit and ownership of Pierpont Community & Technical College.

The College desires to select a Company that can meet or exceed the requirements set forth by the College and provide comprehensive planning and consulting services at the lowest cost and highest quality, that can demonstrate outstanding ability to coordinate and cooperate with Pierpont's administration and staff, as well as with any other Company's, contractors, and vendors that Pierpont may engage in relation to the development of Constituent Service Management System..

Submittals shall respond to all questions, requirements, information, terms, and conditions therein. It is at the sole and absolute discretion of the College to reject any submittal as non-responsive if any responded fail to answer each question fully in this RFP.

INTRODUCTION:

Company

As stated above, the purpose of this RFP is to obtain information that will enable the College to select any number of companies that can assist the College in connection with a variety of Constituent Service Management processes. .resources Company's should have experience in CRM software and implementation.

Pierpont Community & Technical College currently serves 13 counties in North Central West Virginia (Barbour, Braxton, Calhoun, Doddridge, Gilmer, Harrison, Lewis, Marion, Monongalia, Preston, Randolph, Taylor, and Upshur) with classes offered at more than 15 locations throughout the region. There are no assumptions for developing options and that a response to this RFP in no way guarantees a Company work at the College.

SCHEDULE OF EVENTS

EVENT	DATE
Release RFP	July 15, 2021
Last Day to Submit Questions	July 21, 2021
RFP Submittal Deadline	August 18, 2021
Receive and Evaluate Responses	August 21, 2021
Interviews with Selected Respondents as Deemed Appropriate	August 25, 2021
Board Approval	September 2021
Notice to Proceed	September 2021-TBD
Kick-Off Meeting	September, 2021-TBD
First Draft Due	
Final Draft Due	
Completion Date	December 1, 2021
<u>Note:</u> All dates are subject to revision by the College. Nothing herein binds or shall be construed to bind PIERPONT COMMUNITY & TECHNICAL COLLEGE to enter into any agreement with any party, including any Respondent hereto.	

PIERPONT COMMUNITY & TECHNICAL COLLEGE

REQUEST FOR PROPOSALS CRM Software

SECTION 1: GENERAL INFORMATION

1.1 College Overview:

In 1974 - The Community College was established at Fairmont State College. In 2004, SB 448 reclassified Pierpont Community & Technical College, thereby establishing a Local Consortium District for the Community College. In 2008, the Higher Learning Commission held a focus visit at Pierpont. It recommended that the accreditation achieved in 2003 be reinstated for Pierpont Community & Technical College. Thus, establishing Pierpont Community & Technical College as an independently accredited institution, August 1, 2008,

Pierpont is headquartered in Fairmont, West Virginia, in I-79 Technology Park campus in the Pierpont North Central West Virginia Advanced Technology Center (ATC), a 65,000+ square foot facility on 2.5 acres located in the park. On April 1, 2021, Pierpont Community & Technical and Fairmont State University executed a Final Separation Agreement.

Pierpont CTC serves a 13-county area in North Central West Virginia, with facilities at the Pierpont North Central West Virginia Advanced Technology Center in the I-79 Technology Park in Fairmont, WV, the Gaston Caperton Center in Clarksburg, WV, the National Aerospace Education Center at the North Central WV Airport in Bridgeport, WV, the Pierpont Center at the Braxton County High School in Flatwoods, WV, the Pierpont Center in Morgantown, WV, and the Pierpont Center at the Lewis County High School in Weston, WV.

Pierpont CTC offers General Business/Accounting, Liberal Studies, Criminal Justice, and the competitive Physical Therapist Assistant Program at the Gaston Caperton Center, a higher education regional campus facility located at 501 West Main Street downtown Clarksburg, WV. The Center is a 36,000 square-foot facility.

Additionally, Pierpont offers various programs at the Pierpont Center at the Braxton County High School in Flatwoods, WV, just off South I-79 Exit 67. Courses offered to include General Education courses and Associate Degree programs and a Licensed Practical Nurse (LPN.) program under the School of Health Careers.

Pierpont operates the Pierpont Center in Morgantown, WV, at the Monongalia County Technical Education Center (MTEC) and has delivered educational courses at MTEC for many years. The Pierpont Center at MTEC is an 8,400 square foot shared educational facility that has allowed Pierpont to expand course offerings in Morgantown to include Early Childhood, Business Technology programs, and Information Systems. A variety of daytime classes are offered for many of its programs. MTEC is located just off Greenbag Road at 1000 Mississippi Street in south Morgantown.

At the Lewis County High School in Weston, WV, the Pierpont Center is the current headquarters for Pierpont's Regional Academics. A variety of courses are offered each semester. The Center is located at 205 Minuteman Drive, in the Lewis County High School, in Weston, WV.

Pierpont offers 37 Associate in Applied Science (AAS) degree programs; two (2) Associate of Arts (AA) degree programs; nine (9) Certificate of Applied Science; fifteen (15) Advanced Skill Set Certificates; and eighteen (18) Skill Sets. A number of the associate degree programs transfer to four-year baccalaureate programs at other state-supported institutions. Courses are offered online and through an interactive video, network to increase access for students across the large geographic area served by the College.

Pierpont is part of the state's growing high technology corridor, with a metro area of about 50,000 residents. With an enrollment of more than 2,100 students an academic year. Pierpont currently offers a combination of more than 40 Associate of Arts, Associate of Applied Science, Certificate of Applied Science degree programs, Advanced Skill Sets, and Skill Sets. Pierpont has multiple satellite campuses. Pierpont provides workforce training and continuing education for the service region, as well as transfer degrees.

Pierpont's Office of Workforce, Community and Technical Education offers a variety of technical training programs and customized training and workforce development programs that address the training needs of employers within the College's designated service area. During the past decade, programs and training have been provided, impacting more than 10,000 employees from more than 25 companies. Additionally, in partnership with local vocational centers, the Region 6 Workforce Investment Board, and other educational partners, Pierpont CTC designs customized certificate programs that emphasize industries and skills in which participants can obtain employment quickly and help to alleviate workforce shortages in critical industries that are targeted for growth and economic impact. These programs are designed specifically for adults with little or no postsecondary education, thus increasing adult access to higher education while providing training that is immediately relevant to the adult's employment goal.

1.2 Scope of Project:

The CRM solution sought will support prospect recruitment, admissions, student success operations, alumni, communications, marketing, and reporting/analysis needs.

1. Comprehensive integration of marketing, recruitment, retention, student (full student lifecycle), and alumni activities in a single system.
2. Highly configurable system with customizable workflows and triggers that enable the automation of activities across all stages of the student lifecycle based on a combination of complex business rules, demographic, behavior, and activity data.
3. Integration and automated data synchronization with other college applications and data systems. The proposed system must be capable of automated synchronization with Ellucian Banner, the college's student information system (SIS).
4. Web services and a well-developed, well-documented API that allows access to raw data and enables integration with other data sources.
5. Extensive and flexible reporting features that enable real-time, dynamic analysis across related data objects and scheduled delivery of reports.
6. Self-serve prospective student online application feature.

The future vision is a CRM solution that is robust and scalable to meet the enterprise-wide needs of Pierpont Community & Technical College. The solution should span the entire

student life cycle (prospects, inquiries, applicants, admitted applicants, newly enrolled students, and current students). Pierpont anticipates that Implementation will start with marketing to prospects, recruitment, and admissions. Later phases would include additional campus offices such as Financial Aid and Student Records, Student Services and Alumni Relations and Foundation. The timeline for the completion and acceptance of the RFP is critical and must be completed by December 1st 2021.

SECTION 2: SUBMITTING PROPOSALS

2.1 Proposal Format and Submission

The Director of Procurement will receive proposals until **August 15, 2021** Eastern Time. Original proposal RFP shall be submitted to the Pierpont Community & Technical College Procurement Department. The submission must take place prior to the date and time stipulated as the opening date. Each proposal RFP will be date and time stamped on the Procurement Department's official time clock to verify the time and date of receipt.

Potential bidders mailing expressions should allow sufficient time for mail delivery to ensure timely arrival. The Procurement Department CANNOT waive or excuse late receipt of an expression that is delayed and late for any reason. Any RFP received after the bid opening time, and date will be immediately disqualified.

The RESPONSE should be concise and

The delivered bid must include:

- A cover letter containing a:
 - Executive summary clearly summarizing your solution offering and differentiators:
 - Contact person, his/her signature mailing address, email address and telephone number
 - Brief overview of your corporate history related to higher education.
 - Legal status of the company (private, wholly owned subsidiary, holding company, public, etc.).
 - Show cost of ownership
 - Please separate implementations, administration, and maintenance cost.
 - Cost should cover five years showing separate annual cost
 - Sample implementation project plan with approximate timelines

Include all required forms/licenses/certifications

- Meet mandatory requirements or otherwise may result in a proposal being considered nonresponsive and therefore rejected:

AND

- Printed copies (five) be submitted in binder form. The official name of the vendor submitting the proposal must be on the outside front cover and spine of the binder
- Be typed/printed on standard 8.5x11 inch paper (up to 11x17 inch is permissible for charts spreadsheets)

Five (5) copies in a sealed opaque envelope shall be delivered no later than August 15, 2021 , at **5:00 pm** (EST) to:

Pierpont Community & Technical College
Attention: David Williams
Office of the Director of Procurement
500 Galliher Drive
Fairmont, WV 26554

The outside of the envelope or package(s) should clearly be marked:

Director of Procurement: David Williams

Request #: _____

Opening Date: _____

Opening Time: _____

Faxed or electronically transmitted proposals will not be accepted. All documents and information submitted in response to this request for proposal will be considered public information, pursuant to the West Virginia Freedom of Information Act.

2.2 Inquiries:

Questions and requests for clarifications must be submitted in writing and delivered by US Postal Service, courier service, fax, or email. Questions and request for clarification will be received until July 21, 2021 , 2021, and must be directed to:

David Williams, Director of Procurement
Pierpont Community & Technical College
Office of the Director of Procurement
500 Galliher Drive
Fairmont, WV 26554
Telephone: (304) 367-4808
Email: dwilliams29@pierpont.edu

Potential bidders, or anyone on the potential bidders' behalf, are not permitted to contact any members of the evaluation committee. Violation may result in the rejection of the RFP. The Director of Procurement listed above is the sole contact for all inquiries after this RFP has been released.

This RFP answers questions, requests for clarification, and any additional information regarding the RFP will be posted on the following URL. It is the vendor's responsibility to check the webpage for addenda and additional information regarding this RFP. Please acknowledge receipt of the addenda in the proposal.

SECTION 3: SERVICES REQUIRED

Requirements included below are key functionality for Pierpont CTC's constituents. Vendors should describe how the proposed solution meets these requirements. Clear and concise responses are requested

Functional Requirements

1. Describe the scalability of the solution. How will the solution adjust to future growing needs?
2. Describe the support you provide for multiple segments and admissions programs of the institution.
3. How does your solution incorporate financial aid information during the recruiting process? For example, how easy is it for Admissions Staff to view current financial aid information/data during the recruiting process?
4. Describe the tools available for the prospective student to connect with the institution.
5. Describe the ability to track multiple prospective student populations (for example, undergraduate, international, grouping by program, etc.).

6. Describe the ability to track related constituents such as parents, high school counselors, and agents.
 7. Describe the ability to track organizations such as high school, community organizations, or other organization
 8. What functionality do you offer to track the various stages of the recruitment cycle? (prospect, inquiry, applicant, application review, admit, confirmed, enrolled,
 9. Do you offer a dashboard to graphically track your prospects' movement through the enrollment funnel?
 10. Do you deliver imports for purchased names, such as ACT and CollegeBoard?
 11. How does your solution help institutions comply with regulatory standards in higher education?
- Does your solution offer functionality and services to help with compliance?
12. How does your solution support tracking of high school visits and prospect yield from these visits?
 13. Can your solution track expenses and provide ROI metrics for trips and events?
 14. With what communication channels does your solution allow us to reach out prospects? (for example, bulk email, text, phone, etc.)
 15. Are communications mobile-responsive?
 16. Does your solution allow us to create separate Communication Plans for different groups of prospects based on their unique characteristics or program of interest? Can multiple types of communication (email, text, etc.) be automated through these Communication Plans? Can these communications sent to prospects through a Communication Plan change dynamically based on a prospect's unique actions?
 17. Does your solution support a self-service prospective student portal where prospects can submit an inquiry, create an account, and apply for their program of interest?
 18. Does your solution enable institutions to display an offer of admission to a prospective student electronically from the prospective student's account in the self-service portal? Can the student then make their decision from that account?
 19. Describe how your solution tracks every interaction with a prospective student from a single record.
 20. In addition to an individual student record, does your solution have a separate way of tracking each program a prospect has applied for or simply shown an interest?
 21. Does your solution offer a paperless application folder review process with a business process to move each review through from initial review to completion? Can we tailor this process to our specific needs?
 22. What kind of reporting does your solution offer to report on our recruitment and enrollment goals?
 23. Does your solution allow our admissions team to assign tasks to various team members and track the completion of these tasks?
 24. (If applicable) Does your solution offer integration capabilities with commonly used Microsoft Office365 products, such as Word, Excel, and Microsoft Outlook for email and calendar management?
 25. (If applicable) Describe the level of out of the box integration with Ellucian ERP systems.
- Reporting and Analytics Requirements

Reporting and Analytics Requirements

1. Describe the reporting options available to end users.
2. Can end users filter and sort on views? Describe how users view and interact with the data and information.

3. Describe how users create custom dashboards and reports so they only see content that is relevant to their role.
4. Describe how end users can share dashboards and views with other users.
5. Describe how end users can drill down in a report, dashboard, or view to see more detail.
6. What type of file import formats do you support? What type of export files do you support?
7. What is the proposed solution's search model? How can end users search for data?
8. Does your solution support the use of the reporting tool of our choice? Please describe.
9. Please describe how users can receive a daily data extract of their data if necessary. Technical and Security Requirements
10. 3. How will you keep our data safe in the cloud?
11. 4. Do you have a disaster recovery plan? Please describe.
12. Do you offer real-time information on system status? Please describe
13. Please describe how the solution is hosted in the cloud and what services are included
14. What is your experience with and how does your cloud solution meet the specific needs of Higher Education?
15. Do you offer an open and extensible architecture and data model? Please describe.
16. How will your solution help us comply with regulatory mandates and industry standards?

Implementation

Methodology Vendors should provide detailed information of the implementation services for successful implementation of the proposed software. Include at a minimum, the following information:

1. An overview of your implementation methodologies. Include how this methodology will help ensure our success
2. An overview of your education and knowledge sharing methodologies
3. An overview of data migration methodology and tools
4. An overview of documentation or delivery collateral
5. An overview of system and business process validation
6. A high-level project timeline and deployment methodology
7. An overview of Pierpont CTC resources required for successful implementation
8. An overview of vendor resources for a successful implementation
9. How you use third-party implementation delivery partners for our project Post-Implementation Support/Value Added Services Vendors should provide detailed information of available ongoing support of the proposed software. Include at a minimum, the following information:
10. Post Go-Live Support Services (Help)
11. Support turnaround time or resolution time for support incidents and escalation procedures3. Upgrade release methodology Constituent Participation and Communication Vendors should provide detailed information of the available ongoing support options for the proposed software.:

Methodology

Vendors should provide detailed information of the implementation services for successful implementation of the proposed software. Include at a minimum, the following information:

1. 1.An overview of your implementation methodologies. Include how this methodology will help ensure our success
2. 2.An overview of your education and knowledge sharing methodologies
3. 3.An overview of data migration methodology and tools
4. 4.An overview of documentation or delivery collateral
5. 5.An overview of system and business process validation
6. 6.A high-level project timeline and deployment methodology
7. 7.An overview of Pierpont CTC resources required for successful implementation
8. 8.An overview of vendor resources for a successful implementation
9. 9.How you use third-party implementation delivery partners for our project

Please provide, at minimum, the following information:

- Company history
- Demonstrated commitment to Higher Education
- Financial Stability
- Commitment to Constituent's overall satisfaction (as indicated by independent scores such as NPS, Gartner, etc.)
- Experience of staff that will help with long-term success
- Commitment to continuous improvement of solutions
- Awards, recognitions, etc. Cost Proposal Please provide an itemized summary of the proposed components. References For the purpose of this evaluation, vendors should provide evidence of Constituent satisfaction to include:
 - Success stories of Constituents using the proposed solution(s)
 - Constituent quotes or video testimonials (specific references will be requested of vendors selected as finalists)
- What percentage of your Constituent base are higher education institutions?
- How many Higher Education Constituents are using your proposed solutions?

SECTION 4: EVALUATION AND SELECTION PROCESS

- 4.1 All acceptable proposals will be evaluated by a Pierpont Community & Technical College Facility Master Plan Working Group committee based on the criteria listed in this RFP and in accordance with the WV Higher Education Purchasing Regulations.
- 4.2 The evaluation committee may elect to interview one or more companies. Interviews may be conducted in person or by telephone/video conference call. If interviews are held, final adjustments in the evaluation scoring will be made following the interview. The proposal receiving the highest overall score will be declared the most advantageous.

- 4.3 Evaluations will be based on overall services, qualifications, and recent experience and costs presented in the proposal. An award will be made based on the evaluation committee's determination of the best-qualified Company to provide the services. A contract will not necessarily be awarded to the vendor submitting the lowest cost proposal. Pierpont Community & Technical College shall select the best value solution.
- 4.4 Pierpont Community & Technical College reserves the right to accept or reject any or all expressions if it is in the best interest of the College to do so and to waive any irregularities in the Response received when such irregularities are not in conflict with the West Virginia Code or the Higher Education Purchasing Regulations. The College also reserves the right to withdraw this RFP at any time and for any reason.

SECTION 5: PROPOSAL PREPARATION AND EVALUATION CRITERIA

- 5.1 Affirm that the Company who will be providing the services in this contract is free from obligation and interests that might conflict with Pierpont Community & Technical College or the State of West Virginia. Disclose any information about the Company that presently or in the future could impair your ability to provide the required level of services. (Yes/No)
- 5.2 Expertise, experience, and qualifications of the Company's personnel in each discipline that may provide services relevant to the RFP; Expertise, experience, and qualifications of any special company proposed. (20 points)
- 5.3 Experience with higher education clients to include preparation of required Facilities Master Plan and realistic understanding of current needs and trends in higher education facilities, emphasizing Community Colleges. (20 points)
- 5.4 Expertise and experience of the Company in providing services on other term contracts or on other projects of similar size, scope, and features as those required for the Scope of Project and Services Required sections on this RFP (20 points)
- 5.5 Overall suitability to provide the services outlined in the RFP within the time, budget, and operational constraints that may be present and the comments and/or recommendations of the Company's previous clients and references. (20 points)
- 5.6 Provide a fee and expense proposal for the cost of the service. Actual fees and expenses may be negotiated but may not exceed the amount specified in your proposal. (20 points)

SECTION 6: OTHER PROVISIONS

- 6.1 Pierpont Community & Technical College reserves the right to add additional related services based on the original offer. Upon mutual consent of the College and the successful Company on pricing, performance, etc., the additional services may be added to the contract.
- 6.2 All expenses incurred in the preparation and submission of proposals or for any oral interviews are the exclusive responsibility of the vendor. Proposals will become a matter of public record and open for inspection following the announcement of the award.
- 6.3 The successful Company must be a registered vendor with the Purchasing Division, West Virginia Department of Administration, and have a valid vendor number.

- 6.4** The successful Company must have a current W-9 Request for Taxpayer Identification Number Form on File with the Finance Division, Financial Accounting, and Reporting Section, WV Department of Administration, and have a valid vendor number.
- 6.5** Payment for services, not to exceed the maximum proposed, will be made monthly in arrears upon satisfactory completion of the required services, submission of an uncontested invoice, and the acceptance of required reports. Advance payments are not allowed.
- 6.6** Pierpont Community & Technical College and the State of West Virginia are exempt from federal and state taxes and will not pay or reimburse such taxes. The Company may request a tax exemption certificate.
- 6.7** The proposal shall provide complete and total compensation for the scope of work identified herein. Pierpont Community & Technical College must approve additional services and additional compensation if deemed appropriate, and an approved change order is required before payment can be made.
- 6.8** Discussions and interviews may be held with individuals or under final consideration prior to selecting for the award; however, a proposal may be accepted without such discussions or interviews. In the event that mutually acceptable terms cannot be reached within a reasonable period of time, Pierpont Community & Technical College reserves the right to undertake negotiations with the next most advantageous Company/Organization without undertaking a new procurement process.
- 6.9** The State's WV-96 is attached to demonstrate the State law and guidelines, which must be adhered to in any contracts presented to the College for execution. The successful vendor must be registered with the WV Department of Administration prior to any award, pay the registration fee, and have a valid vendor number.