



## Amendment #2

Solicitation Number **RFP-2333**  
 Date Issued **12/12/2019**  
 Purchasing Officer **Paul MacDonald**  
 Phone **(843) 661-1161**  
 E-Mail Address **[pmacdonald@fmarion.edu](mailto:pmacdonald@fmarion.edu)**  
 Amendment Date **1/8/2020**

DESCRIPTION: **Provide Customer Relationship Management System for Admissions**

*The Term "Offer" Means Your "Bid" or "Proposal".*

SUBMIT OFFER BY (Opening Date/Time): **01/21/2020 at 2:00 PM EST** See "Deadline For Submission Of Offer" provision

QUESTIONS MUST BE RECEIVED BY: **01/03/2020 at 2:00 PM EST** See "Questions From Offerors" provision

NUMBER OF COPIES TO BE SUBMITTED: **One (1) original in hard copy, three (3) copies in hard copy clearly marked "COPY," one Magnetic Media as Specified and One (1) Redacted Copy as Specified.**

**SUBMIT YOUR OFFER TO ONE OF THE FOLLOWING ADDRESSES IN A SEALED PACKAGE.**

MAILING ADDRESS: <b>Francis Marion University Purchasing Office P.O. Box 100547 Florence, SC 29502-0547</b>	EXPRESS SHIPPING ADDRESS: <b>Francis Marion University Central Receiving 4822 E. Palmetto Street Florence, SC 29506</b>	HAND-DELIVERY: <b>Francis Marion University Purchasing Office (Room 102) Stokes Administration Building 4822 E. Palmetto Street Florence, SC 29506</b>
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CONFERENCE TYPE: <b>N/A</b> DATE & TIME: <b>N/A</b> As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions	LOCATION: <b>N/A</b>
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AWARD & AMENDMENTS	A <b>Notice of Intent to Award</b> will be posted at the Physical Address stated above on or around <b>01/24/2020</b> . The award, this solicitation, and any amendments will be posted at the following web address: <a href="http://www.fmarion.edu/about/solicitationsawards">http://www.fmarion.edu/about/solicitationsawards</a>
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You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the Opening Date.

NAME OF OFFEROR (Full legal name of business submitting the offer)	OFFEROR'S TYPE OF ENTITY: (Check one)
AUTHORIZED SIGNATURE  (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)	<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) <input type="checkbox"/> Other _____
TITLE (Business title of person signing above)	
PRINTED NAME (Printed name of person signing above)      DATE SIGNED	

(See "Signing Your Offer" provision.)

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, *i.e.*, a separate corporation, partnership, sole proprietorship, etc.

STATE OF INCORPORATION (If Offeror is a corporation, identify the state of Incorporation.)
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TAXPAYER IDENTIFICATION NO.  (See "Taxpayer Identification Number" provision)
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**PAGE TWO**

**(Return Page Two with Your Offer)**

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)
	Address
	Area Code - Number - Extension <span style="float: right;">Facsimile</span>
	E-mail Address

PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses)
___ Payment Address same as Home Office Address ___ Payment Address same as Notice Address ( <b>check only one</b> )	___ Order Address same as Home Office Address ___ Order Address same as Notice Address ( <b>check only one</b> )

<b>ACKNOWLEDGMENT OF AMENDMENTS</b> Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)							
Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date

DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	_____ Calendar Days (%)
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PREFERENCES DO NOT APPLY WITH THIS SOLICITATION: Per Section 11-35-1524(E)(5) preferences do not apply to to procurements conducted pursuant to Section 11-35-1530 of the South Carolina Consolidated Procurement Code.

## Amendment 2

### RFP-2333 – Provide Customer Relationship Management System for Admissions

#### AMENDMENTS TO SOLICITATION

- (a) The Solicitation may be amended at any time prior to opening.
- (b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment.
- (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

#### Modifications

The following have been **added** or **changed/removed**:

Cover page, Page 1

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Section III. Scope of Work/Specifications, Specifications, Product, General:

- The Offeror's CRM proposal may include a third party vendor (e.g. platform provider) for complete application of the CRM.
- All correspondence regarding the proposed CRM for the awarded contract shall go through the CRM offeror. In the event of any work or issues regarding a third party vendor offering as part of the product, all coordination and correspondence for any said work or issues will be between the University and the CRM contractor; with exceptions allowed only at the discretion of the University.
- Third party agreement(s) associated with the Offeror's proposal shall be included with all proposal materials as part of the Offeror's proposal.
- Third party agreement(s) must meet all of the terms indicated in this Request for Proposal and must comply with South Carolina law. A proposed third party agreement which does not meet all of the terms of the RFP or which does not comply with South Carolina law may render the entire proposal non-responsive and therefore that proposal may no longer be considered as a valid proposal for this solicitation.

Section III. Scope of Work/Specifications, Specifications, Information Technology:

- Product shall be scalable to allow for ease of transition to updated versions of CRM, its platform, or other associated changes common or uncommon to this product.
- Product shall be scalable to allow for compatibility with version and other changes to the University's existing ERP and other software programs.

Section III. Scope of Work/Specifications, Specifications, Service:

- The University prefers that a single annual payment be made to the CRM provider for annual service.
  - In the event of the involvement of a third party agreement as part of this proposal, the University prefers that the entire annual payment be made as a single payment to the CRM provider and the CRM provider would then pay the third party as part of that singular payment.

IV. Information to Submit, Section 5 Technical Proposal, Additional Details to be Provided in Technical Proposal

- Identify the CRM platform utilized as part of the CRM proposal including the company's name, and specific version of platform being provided.
  - If the platform proposed is a third party agreement, proposal shall provide all details from Section V. Qualifications, of this document.

VIII. Bidding Schedule/Price Business Proposal:

Item 1 - All costs associated with implementation/installation of CRM solution inclusive of costs associated with third party service(s)

Item 2 - All costs for proposed CRM solution for Year 1 inclusive of costs associated with third party agreement(s).

Item 3 - All costs for proposed CRM solution for Year 2 inclusive of costs associated with third party agreements(s).

Item 4 - All costs for proposed CRM solution for Year 3 inclusive of costs associated with third party agreements(s).

Item 5 - All costs for proposed CRM solution for Year 4 inclusive of costs associated with third party agreements(s).

Item 6 - All costs for proposed CRM solution for Year 5 inclusive of costs associated with third party agreements(s).

## Vendor Questions and Answers

<b>Question 1</b>	Please provide a timeline of procurement events between the submission deadline and contract start? (e.g. demonstrations, initial selection, etc)
<b>Answer</b>	See Modifications section above for correction to cover page. Unless amended, the University intends to follow the timeline defined in the solicitation.
<b>Question 2</b>	Please provide the titles of the members of the proposal evaluation team?
<b>Answer</b>	The university does not disclose the members of the proposal evaluation team so as to restrict any risk of influence from an offeror upon an evaluator.
<b>Question 3</b>	Please provide the scoring matrix for how proposals and/or demonstrations will be scored?
<b>Answer</b>	NO CHANGE – see EVALUATION FACTORS – PROPOSALS beginning on page 23.
<b>Question 4</b>	Why is the University seeking a new CRM?
<b>Answer</b>	NO CHANGE – see Objective beginning on page 13.
<b>Question 5</b>	What functional/operational issues with the current CRM and/or online application is the University seeking to improve with a new system?
<b>Answer</b>	NO CHANGE – see FMU Office of Admissions existing processes beginning on page 11.
<b>Question 6</b>	Is there a phasing plan for the project to cover different departments and aspects of the solution? If so, can this please be shared?
<b>Answer</b>	The university wishes for the offeror to provide their proposed implementation plan based upon the solicited request for proposal.
<b>Question 7</b>	How many prospective suppliers will be invited to provide demonstrations for this project?
<b>Answer</b>	The University is not requesting a demonstration as part of its request for proposal.
<b>Question 8</b>	Is it mandatory for presentations to be in-person?
<b>Answer</b>	The University is not requesting a demonstration as part of its request for proposal.
<b>Question 9</b>	Does the University require demos/presentations to be live vs recorded?
<b>Answer</b>	The University is not requesting a demonstration as part of its request for proposal.
<b>Question 10</b>	Has a budget been allocated and approved for this project?
<b>Answer</b>	The University has allocated and approved a budget for this project.
<b>Question 11</b>	What is the University's budget for the project?
<b>Answer</b>	The University's established maximum budget for this project is as follows: One time maximum implementation/installation expense: \$32,000.00. Annual Maintenance, Support, Hosting, and other costs <i>excluding</i> one time maximum implementation/installation expense: \$29,000.00 per year.  Regardless of proposed costs, the entirety of the contract value shall not exceed \$175,000.00
<b>Question 12</b>	How is the University currently integrating between the CRM/online application and the SIS?
<b>Answer</b>	The University uses a script to pull and format new data out of our current CRM and use Ellucian's AAI/ELF import methods to get the data into Colleague.

<b>Question 13</b>	Are there any other systems the University intends to integrate with the CRM?
<b>Answer</b>	NO CHANGE - The University's needs may evolve over time (see page 18 Additional Requirements "The Office of Admissions' operational needs continue to evolve over time. Proposed CRM should be realistically modifiable and customizable to meet the ongoing needs of the University."). The University will evaluate proposals based upon capabilities of integration as already described in the solicitation (e.g. Specifications/Product/General page 14 "Integration with TouchNet services beyond Touchnet's basic payment gateway.", Specifications/Product/Information Technology page 16 "Proposed CRM shall successfully integrate with Ellucian Colleague Products, Perceptive Data Transfer, and Hyland Management program.").
<b>Question 14</b>	What staff and resources does the University have to manage data integration? Is there a preference of the staff to work via API or other approach (e.g. batch file, direct to database)?
<b>Answer</b>	University staff availability for the data integration/migration is limited. Per page 20, "Provide detail as to how your system will minimize the resources required from the Campus Information Technology Department to implement and maintain the proposed system."  The University's preference is for the CRM vendor to have an accurate and reliable direct database connection to Colleague, however an API would be sufficient.
<b>Question 15</b>	Is the University flexible with regards to the April 1 go-live date? Given the estimated contract start date of February 7th, this allows for less than two months. Would the university be willing to consider flexible phasing plans to allow for key elements to be live by the deadline with others shortly thereafter to help maximize adoption and mitigate overall project risk?
<b>Answer</b>	The University would consider flexible options regarding the April 1 go-live date. Phased implementation is acceptable. The University's EMAS support will end July 31, so the University must have time for training and have time to open the application and begin accepting students no later than Aug 1, 2020.
<b>Question 16</b>	Is there a requirement for the vendor to attend in-person for some of the implementation meetings/workshops?
<b>Answer</b>	NO CHANGE – see page 17 of the Scope of Work – Training, including the second item of this section "Provide on-site and remote training program for select university employees prior to Go-Live utilization of proposed CRM.".
<b>Question 17</b>	Does the University have a preference between DIY solutions requiring the University's technical resources to self-implement the solution or solutions that offer vendor-managed implementation services?
<b>Answer</b>	NO CHANGE - Per page 20, "Provide detail as to how your system will minimize the resources required from the Campus Information Technology Department to implement and maintain the proposed system."
<b>Question 18</b>	What University staff have been/will be assigned to the project for implementation?
<b>Answer</b>	University staff may be designated to the project to aid in implementation after a proposal is selected and it is determined based upon the selected proposal which specific staff member(s) are necessary to aid in this implementation.
<b>Question 19</b>	What is the University's annual inquiry volume? Please breakdown by departments that would be utilizing the solution.
<b>Answer</b>	NO CHANGE – see Page 11 FMU Office of Admissions existing processes.
<b>Question 20</b>	What is the University's annual application volume? Please breakdown by departments utilizing the solution.
<b>Answer</b>	NO CHANGE – see Page 11 FMU Office of Admissions existing processes.
<b>Question 21</b>	How many users will be admins/power users who may need full system access and/or mass communication access?
<b>Answer</b>	Approximately 3-5 people.
<b>Question 22</b>	How many users will be basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access?
<b>Answer</b>	Approximately 10-15 people.

<b>Question 23</b>	Is there a preference/requirement for solutions that offer unlimited email sending without per-contact/message costs?
<b>Answer</b>	The University requires for unlimited email sending without per-contact/message costs.
<b>Question 24</b>	Is there a preference/requirement for solutions that offer unlimited text messaging without per-contact/message costs?
<b>Answer</b>	The University requires for unlimited text messaging without per-contact/message costs.
<b>Question 25</b>	The Solicitation mentions integration with Mailchimp; is the University's intent requirement to replace MailChimp with email functionality in the CRM or to still be able to integrate with MailChimp?
<b>Answer</b>	NO CHANGE – see Page 14 ( <i>emphasis added</i> ) “CRM shall generate mailing lists and form letters, and be capable of exporting data into external applications <i>including but not limited to Mailchimp.</i> ”.
<b>Question 26</b>	Is there a preference/requirement for solutions that can expand in the future further across campus beyond admissions (e.g. student success, advancement, etc)?
<b>Answer</b>	NO CHANGE - The University has existing tools for student success and advancement, however the University's needs may evolve over time (see page 18 Additional Requirements “The Office of Admissions’ operational needs continue to evolve over time. Proposed CRM should be realistically modifiable and customizable to meet the ongoing needs of the University.)”.
<b>Question 27</b>	Has the University seen demos of any potential CRM solutions or related technologies in the last 12 months? If so, which ones?
<b>Answer</b>	As with this request for proposal and for other solicitations, the University routinely does market research to determine how to best solicit for a solution for its needs. The University has seen demonstrations and related technologies as part of this research. Providing a list of demonstrations or technologies which were reviewed by the University could wrongly direct offerors to tailor their proposals to the University's market research rather than to the solicitation itself, therefore the University is not disclosing the demos or related technologies it has researched.
<b>Question 28</b>	Has the University worked or consulted with any vendors and/or external sources in the development of the requirements for this RFP? If so, please identify.
<b>Answer</b>	As with this request for proposal and for other solicitations, the University routinely reviews related solicitations from other institutions and discusses topics with the vendor community prior to developing a solicitation for a solution for the University's needs. As part of the University's market research, it has reviewed related solicitations from other institutions and discussed topics with the vendor community prior to developing this solicitation. Providing a list of vendors and institution solicitations reviewed by the University prior to its development of this request for proposal could wrongly direct offerors to tailor their proposals to the University's market research rather than to the solicitation itself, therefore the University is not disclosing the vendors or related institutions solicitations reviewed prior to developing this request for proposal.
<b>Question 29</b>	If the selected vendor has a recently negotiated contract with a similar state institution, can those terms and conditions be utilized for the final award?
<b>Answer</b>	NO CHANGE – The University will select the proposal that best meets the needs identified in the solicitation.

Vendor: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_  
(Same signature as individual who signed cover page of the solicitation)

Date: \_\_\_\_\_

**END OF AMENDMENT 2**