



Francis Marion University- Amendment 1

Solicitation Number **RFP- 2445**
Date Issued **07/08/2024**
Purchasing Officer **Jennifer D Hester**
Phone **(843) 661-1161**
E-Mail Address **jdhester@fmarion.edu**

DESCRIPTION: **Provide an Admission Enrollment Program Software to Francis Marion University**

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

SUBMIT OFFER BY (Opening Date/Time): **07/25/2024 at 2:00 PM EST** See "Deadline For Submission Of Offer" provision

~~QUESTIONS MUST BE RECEIVED BY: 07/08/2024 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 (1) flash drive or other USB device as Specified and One (1) Redacted Copy as Specified.**

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

MAILING ADDRESS: Francis Marion University Purchasing Office P.O. Box 100547 Florence, SC 29502-0547	EXPRESS SHIPPING ADDRESS: Francis Marion University Central Receiving 4822 E. Palmetto Street Florence, SC 29506	HAND-DELIVERY: Francis Marion University Purchasing Office (Room 102) Stokes Administration Building 4822 E. Palmetto Street Florence, SC 29506
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CONFERENCE TYPE: **N/A**
DATE & TIME: **N/A**
As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions

LOCATION:
N/A

AWARD & AMENDMENTS A **Statement of Intent to Award** will be posted at the Physical Address stated on **08/7/2024**. The award, this solicitation, and any amendments will be posted at the following web address: <http://www.fmarion.edu/about/solicitationsawards>

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) <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 _____
AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)		
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.)

TAXPAYER IDENTIFICATION NO.

(See "Taxpayer Identification Number" provision)

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 Facsimile
	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 (check only one)	___ Order Address same as Home Office Address ___ Order Address same as Notice Address (check only one)

ACKNOWLEDGMENT OF AMENDMENTS 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 - A NOTICE TO VENDORS: On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at www.procurement.sc.gov/preferences.

PREFERENCES DO NOT APPLY WITH THIS SOLICITATION: Per Section 11-35-1524(E)(5) preferences do not apply to procurements conducted pursuant to Section 11-35-1530 of the South Carolina Consolidated Procurement Code.

PREFERENCES - ADDRESS AND PHONE OF IN-STATE OFFICE:

PREFERENCES DO NOT APPLY WITH THIS SOLICITATION: Per Section 11-35-1524(E)(5) preferences do not apply to procurements conducted pursuant to Section 11-35-1530 of the South Carolina Consolidated Procurement Code.

Amendment 1

RFP- 2445- Provide an Admission Enrollment Program Software to Francis Marion

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** or **emphasized**:

- 1) Cover Page, Page 1- Removed Questions must be received by date and time.

QUESTIONS MUST BE RECEIVED BY: ~~07/08/2024 at 2:00 PM EST~~ — See "Questions From Offerors" provision

Questions from Vendors

Question 1	If we are shipping using UPS, are we to use the Express Shipping Address or Mailing Address to submit our proposal?
Answer	If you use Express Shipping, you will use the Express Shipping Address. If you use the normal shipping (as in no express shipping), then you will use the mailing address. It must have RFP- 2445- Admission Enrollment Program on the outside of the package.
Question 2	What are FMU's top three pain points that led to the release of this RFP?
Answer	1) Desire to enhance the personalization of communication with prospective students. 2) Desire to streamline application processes that are somewhat cumbersome. 3) Desire to expand the top of the enrollment funnel.
Question 3	How is FMU currently handling applications and enrollments?
Answer	These are currently handled exclusively through members of the admissions staff, each of whom is assigned to a particular segment of the prospect pool. Staff members review and make decisions on applications, and then communicate with admitted students through summer orientation, which is the time they become enrolled.

Question 4	How is FMU currently handling student recruitment? Through what methods?
Answer	Recruitment strategies are currently very traditional. FMU utilizes the regular student lists to make initial contact. The admissions staff travel significantly across the state, especially in the fall, sharing institutional marketing materials at high schools and at college events. Basic communication flows are in place for certain categories of prospects.
Question 5	If pricing is more advantageous for a longer contract, is FMU interested in getting quoted that way?
Answer	No, please only give a quotation for what is asked/required.
Question 6	Is \$325,000 the full budget for this project? If not, what is the budget for this RFP?
Answer	The \$325 is the full budget; the contract cannot exceed a total of \$325,000 over the potential two-year period.
Question 7	How many applications does FMU use today - are they separated by type of student, major, etc.? Meaning, do you have an undergraduate, dual enrollment, graduate breakout? Maybe there are some applications you use by major type. Or maybe you only use one application for everyone (maybe it has conditional logic or maybe not!).
Answer	FMU uses a standard application, which has minor adjustments for transfer and graduate students. Nothing is differentiated by major.
Question 8	Ideally, how would FMU like to see their applications set up? The least possible using conditional logic, per major, etc.?
Answer	The best approach would be the easiest conditional logic. There is no real distinction among majors.
Question 9	If the new enrollment system could also replace Admissions Pros, created one unified system, is FMU interested in that?
Answer	Not at this time, so not as part of this RFP.
Question 10	For any integrations needed, does FMU intend to use flat file, API connection, or another method?
Answer	The intention is flat file, though FMU would be open an alternative approach.
Question 11	Does FMU intend for the vendor to set up and maintain any integrations, or will FMU perform that work?
Answer	This would be the responsibility of the vendor.
Question 12	How many total enrolled students (unduplicated) are enrolled at FMU?
Answer	There are approximately 4,000 unduplicated students enrolled at FMU each year. This includes graduate students as well as undergraduates.
Question 13	Beyond the admissions department, would FMU ever want to scale this tool to other departments (since it can go beyond just enrollment, but multi-modal communications, chatbot, etc.)?
Answer	This is a possibility, but since most contractual partnerships at FMU are initiated at the department level, any such expansion would be a separate discussion.
Question 14	Does FMU currently have a chatbot to assist with the Admissions Dept? If so, with what vendor?
Answer	FMU currently does not use a chatbot.

Question 15	Does FMU only want one copy of the Business (Cost) Proposal?
Answer	One Printed Copy of the Business (Cost) Proposal as discussed on page 22 is sufficient (must be on a flash drive or other USB device as Specified). For Technical and Redacted Requirements, please see pages 19-22.
Question 16	What does FMU's tech stack look like?
Answer	Please see the Attachment 1 below for the Answer to #16.
Question 17	Is FMU interested in consolidating their tech stack?
Answer	Not consolidating at this time, though FMU understands that the result of this RFP could impact its current tech stack.
Question 18	How many applications does FMU receive annually?
Answer	Approximately 5,000 total applications, including graduate and dual enrollment.
Question 19	Is this focused primarily on domestic or international students?
Answer	The target primarily on domestic students, though international students would not be excluded.
Question 20	Can you provide any additional context around the 25,000 students per year component, and how that looks (e.g. like Common App)?
Answer	The university does not use Common App, and the 25,000 number is the goal for an additional number of prospects we would like to add at the top of the enrollment funnel (with an understanding that there would be some, but not many, duplicates).
Question 21	Does Francis Marion have a continuing education division and if so, is the RFP also intended for that division?
Answer	Francis Marion has few/none of the programs indicated, and RFP is only for undergraduate students who would be pursuing a four-year baccalaureate degree.
Question 22	What volume of students do you purchase in a given year as sophomores, as juniors, and as seniors? Is there a desire for change?
Answer	In total, FMU purchases approximately 40,000 names per year. Of these, 80%-85% are seniors and the rest are juniors.
Question 23	What is the size of your current inquiry pool for entering class of 2025?
Answer	Approximately 3,000 currently.
Question 24	Can FMU please provide the decision timeline for this RFP?
Answer	Please see the first page of the solicitation (question date, submission date, and the date of the Intent to Award).
Question 25	Are you willing to accept an electronic submission in lieu of the hard copies? If not, will FMU accept responses on a USB shipped to your location (no hard copies provided)?
Answer	You must follow the instructions on page 1 on how to submit. FMU will not deviate from the given instructions.
Question 26	Are you willing to accept an electronic signature in lieu of a wet ink signature on all hard copy forms?
Answer	No, the hard copies will need to have the correct signature.

Question 27	Are you willing to accept an electronic (scanned) signature on all forms in the USB version of our response?
Answer	You must follow the instructions on page 1; FMU will not deviate from the given instructions. Please make a copy of the signatures and upload to the) flash drive or other USB device as Specified.
Question 28	Can FMU please confirm that the Technical and Business proposals should be divided and submitted in separate binders and USB drives?
Answer	Correct, the vendor shall submit the Business Proposal (all price information) as a separate sealed document (complete Section VIII "Bidding Schedule/Price-Business Proposal"). See Page 22.
Question 29	If yes, can FMU please confirm that they'd like four Technical Proposals (1 original, 3 copies) and four Business Proposals (1 original, 3 copies), for a total of eight hard copy proposal documents?
Answer	As explained in the solicitation, the Technical proposal must have one (1) original in hard copy, three (3) copies in hard copy clearly marked "COPY," one (1) flash drive or other USB device as Specified and One (1) Redacted Copy as Specified. The Business Proposal must be in a sealed separate document than the Technical Proposal. One Printed Original Copy of the Business (Cost) Proposal as discussed on page 22 is sufficient (must be on a flash drive or other USB device as Specified).
Question 30	Can FMU please clarify if there are Minority Business goals/participation requirements for this RFP? The Minority Participation section (p. 22-23) requests information regarding any work to be performed by a certified Minority Business (SC certified or certified by another governmental entity) as a subcontractor. Are these participation requirements scored components of the RFP response?
Answer	The General Assembly has further declared that it is in the State's best interest to assist minority-owned businesses to develop fully as a part of the State's policies and programs designed to promote balanced economic and community growth throughout the State. The Evaluation Factors are listed on page 27.
Question 31	Can FMU please confirm whether audited financials are required with the RFP submission, or if they will be requested at a later date?
Answer	See page 22- >>>1. Financial Statements.
Question 32	If audited financials are required with the RFP submission, we will require an NDA before we can provide those details. That said, as a private company, would a D&B Report suffice for this requirement to assist FMU in assessing our firm's financial health? If not, is FMU willing to sign an NDA prior to the RFP submission deadline so that we may provide our audited financial statements in a protected manner?
Answer	See page 22- >>>1. Financial Statements- you may be requested to provide those statements at a later date. It is not required tp submit, it may be asked at a later time. If asked, FMU will discuss the process with the vendor.
Question 33	Has the University discussed this potential acquisition with vendors and/or seen demonstrations of products prior to issuing this RFP? If yes, can you provide the vendors?
Answer	The University did not request demonstrations with any vendors. FMU end users had previous experiences, at other Universities, with Niche.
Question 34	How do applicants currently apply? Would the University be interested in replacing that process in the interest of streamlining it?

Answer	Applicants currently apply through the university's portal. The university is not currently seeking to replace that process but would consider streamlining options if presented to us.
Question 35	Approximately how many unique email addresses (contacts) does the University include in email marketing campaigns annually? We are looking for the total number of individual email addresses that will be receiving emails from the communication system throughout the year, not the total number of emails sent.
Answer	In all, we approximate this number to be 50,000 – 60,000 annually.
Question 36	How many applications does the University receive annually?
Answer	The university receives approximately 5,000 applications annually for undergraduate programs, which is the population to be served under this RFP.
Question 37	Is the intent of this RFP to replace any existing software products, if so which ones?
Answer	No, this need is a first time procurement purchase for FMU.
Question 38	I am writing to request information regarding a previous award related to 2445. Specifically, I am seeking details from the most recent award prior to the current solicitation.
Answer	This is the first time we are soliciting for this service so there is no prior solicitation or award data to provide.

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Attachment 1 (for answer #16)

FMU Tech Stack

Internet

4GB Primary Circuit with 100MB Secondary (it is boosted to 1GB in the event the Primary is down)

Connectivity

Fiber – Single Mode & Multi Mode
Ethernet – Category 5 & 6

Network Environment

Cisco Routers and Core switches
Aruba Edge switches
Palo Alto
Aruba Wireless
TouchNet Access Control

System Environment

Dell Servers
VMware (Horizon 8, vSphere and vCenter *)
Microsoft Server 2016, 2019, & 2022

Storage

Pure Storage FlashArray X20R3-ETH22TB-22/0- EMEZZ 1 with Evergreen Support
Veeam Backup with Wasabi Gap

ERP (Managed Services in the AWS Cloud)

Ellucian Colleague
Ellucian ILP 5
Ellucian Experience
TouchNet Gateway

Mail Services & Productivity

Microsoft Office 365

Authentication Services

Microsoft Azure

Programming Languages

Ellucian eVison
Python & PHP

Telephony

NEC 9600 (VoIP & TDM)

Workstation

Predominantly Dell with Win 10 & 11

Vendor:

Authorized Signature: _____

(Same signature as individual who signed cover page of the solicitation)

Date: _____

END OF AMENDMENT 1