



**Francis Marion University
Amendment #1**

Solicitation Number **RFP- 2464**
 Date Issued **12/5/2024**
 Purchasing Officer **Jennifer D Hester**
 Phone **(843) 661-1161**
 E-Mail Address **jdhester@fmarion.edu**

DESCRIPTION: **Provide a Customer Relationship Management System for Francis Marion University**

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

SUBMIT OFFER BY (Opening Date/Time): **01/03/2025 at 2:00 PM EST** See "Deadline For Submission Of Offer" provision

~~QUESTIONS MUST BE RECEIVED BY: 12/4/2024 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.

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| 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 |
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| AWARD & AMENDMENTS | A Statement of Intent to Award will be posted at the Physical Address stated on 01/15/2025 . The award, this solicitation, and any amendments will be posted at the following web address: http://www.fmarion.edu/about/solicitationsawards |
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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.

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| 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.)

TAXPAYER IDENTIFICATION NO.
(See "Taxpayer Identification Number" provision)

PAGE TWO

(Return Page Two with Your Offer)

| | | |
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| 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 | |

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| 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 |
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| 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- 2464- Provide a Customer Relationship Management System for Francis Marion University

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- Questions

~~QUESTIONS MUST BE RECEIVED BY: 12/4/2024 at 2:00 PM EST~~ See "Questions From Offerors" provision

Questions Asked

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|-------------------|---|
| Question 1 | How many users will be admins/power users who may need full system access and/or mass communication access? |
| Answer | Admins/power users will be in the range of 20-30. The number of total users will vary over the course of the contract, though each user will have access only to certain areas of the platform. Including faculty advisors, the number of users could exceed 200. |
| Question 2 | How many users will be basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access? |
| Answer | The estimate would be 170-180. |
| Question 3 | When does the University close for Christmas and New Years? |
| Answer | For the 2024 Holiday Calendar, Francis Marion University is closed 12/23/2024-1/1/2025. |
| Question 4 | When is the last day of 2024 that a fedex package can be received? |
| Answer | Mail can be received until noon on 12/20/2024 and then will not be received again until 1/2/2025. |
| Question 5 | What days of the week of Dec 30 to Jan 3rd could a fedex package be received? |
| Answer | Thursday, January 2 and Friday, January 3 (as long as it is by the deadline date and time.) |
| Question 6 | Would the University consider signing two contracts for one solution that includes a platform (Salesforce) and a software solution? |
| Answer | Though not preferred, the University would consider this, as long as the total cost remains the same. |
| Question 7 | Does your current CRM have staff and student facing AI capabilities? |
| Answer | The current CRM does not have any AI capabilities – neither staff facing nor student facing. |

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| Question 8 | Has the University seen demos of any potential CRM solutions or related technologies in the last 12 months? If so, which ones? |
| Answer | The University has seen a small number of demos in the past few months, including EAB and Element451. |
| Question 9 | How many total, unduplicated, enrolled students does Francis Marion University have currently? |
| Answer | FMU reported enrolled 4,112 unduplicated students for the Fall 2024 census. This includes all student types (UG, Grad, Dual Enrollment, Contract, etc.), and within 100-200 students, this has been consistent for over a decade. Our Spring semester typically enrolls about 10% fewer students than our Fall semester. |
| Question 10 | We see the contract is intended for one year with three additional years to renew. If more advantageous pricing is available to sign a four year contract, is that something Francis Marion University is interested in? |
| Answer | Please see the Bidding Schedule/ Price-Business Proposal on page 43. Four-year pricing has been requested and four years is desired for the entire contract. To allow the University and the vendor the options to re-new or not to re-new, the type of contract still remains to say: A contract will be awarded in accordance with the provisions and conditions of this solicitation. The resulting contract will be for one (1) year with up to three (3) additional year options to renew. Please also note on page 3: Regardless of estimated contract dates and any Purchase Orders associated with this contract, contract value shall not exceed \$325,000. University shall not be obligated to pay for any service associated with this contract if services are rendered beyond the stated \$325,000 amount. |
| Question 11 | Is the intention for applications to be hosted directly by the new CRM (CRM-hosted application page that would house and automatically track applications)? |
| Answer | Yes, that is the intention, so as to facilitate effective management and analysis of application information. |
| Question 12 | How are the paper inquiry cards mentioned (Page 12) in your application process circulated to students? |
| Answer | Those inquiry cards are made available to prospective students at recruiting events, such as university open houses, high school visits, etc. Admissions staff are then responsible for ensuring that the student information is entered in the CRM. |
| Question 13 | What is the percentage breakdown of points for the technical proposal, business proposal, and company experience for awarding criteria? |
| Answer | <p>On page 13, the order of criteria is listed by importance of how proposals will be evaluated by the review panel.</p> <p>The request for proposals must state the relative importance of all factors to be considered in evaluating proposals but need not state a numerical weighting for each factor.</p> <p>SECTION 11-35-1535. (b) The request for proposals must state the relative importance of all factors to be considered in evaluating proposals but need not state a numerical weighting for each factor. Except as provided by regulation, past performance and price must be evaluated. If price is an evaluation factor, the solicitation must state whether all evaluation factors other than price, when combined, are significantly more important than, approximately equal to, or significantly less important than price.</p> <p>SECTION 11-35-1530. (5) Evaluation Factors. The request for proposals must state the relative importance of the factors to be considered in evaluating proposals but may not require a numerical weighting for each factor. Price may, but need not, be an evaluation factor.</p> |

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| Question 14 | 'Product shall be installed, and all training complete for a Go-Live no later than April 1, 2025' - is this a hard deadline? |
| Answer | Yes, this is a hard deadline. |
| Question 15 | We kindly request an extension to the current submission deadline. |
| Answer | At this time, the University is not altering the required due dates. The required dates still remain and are listed on page 1 of the RFP-2464. If changes are made, it will be posted on the website: http://www.fmarion.edu/about/solicitationsawards . |
| Question 16 | As a private company, we require an NDA before we can provide a copy of our audited financial statements, thus 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 | Yes, we will accept a D&B report. If you are requested to provide statements at a later date, yes, FMU can sign an NDA at that time. You will still need to state description of failed projects, suspensions, debarments, and significant litigation, if applicable in the qualification section as required on page 26. |
| Question 17 | Are you willing to accept an electronic signature in lieu of a wet ink signature on all forms? |
| Answer | As long as the physical forms are signed (wet ink or electronic added to the physical form), we will accept the signature. |
| Question 18 | 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 copy provided)? |
| Answer | FMU will not accept electronic submission. Please see page 1- Number of Copies to be Submitted regarding how and what to submit by the required submit date (also on page 1.) |
| Question 19 | Could FMU please confirm whether the holiday closure between 12/23/24–1/1/25 will impact the ability to receive RFP submissions? Can Express mail still be received by FMU, with signature, during this time frame, or should vendors plan for our submissions to arrive before or after the FMU holiday closure? |
| Answer | Francis Marion University is closed 12/23/2024-1/1/2025. Mail can be received until noon on 12/20/2024 and then will not be received again until 1/2/2025. Vendors should plan for their proposal to arrive before noon on 12/20/2024 or will need to wait and have their proposal arrive on 1/2/2025 or 1/3/2025. Submissions can be delivered by mail or hand. |
| Question 20 | What are you using currently for your CRM? |
| Answer | AdmissionsPros |
| Question 21 | What is Francis Marion University currently using for undergraduate degree programs? Are you looking to replace this system? |
| Answer | It is not clear what information is being sought by this question. If the question is asking about application/admission systems for undergraduate programs, that is AdmissionsPros as noted above (for both undergraduate and graduate programs). If the question is about the Student Information System it is our Enterprise Resource Planning (ERP), Ellucian/Colleague. |
| Question 22 | What is Francis Marion University currently using for graduate degree programs? Are you looking to replace this system? |
| Answer | See answer to Number 2 above. We are not looking to replace our ERP system. |
| Question 23 | What is Francis Marion University currently using to support its continuing education / professional development programs? If nothing, is the university focused on growing these programs? |
| Answer | The university is not currently using a platform to support these programs, not is it prioritizing the expansion of these programs in the next few years. |
| Question 24 | What is the annual revenue being generated by continuing education / professional development? |

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| Answer | Revenue in these areas is minimal to nothing. It is not a focus for the university. |
| Question 25 | Is Francis Marion University looking for best-of-breed approach with multiple systems designed for each use case above or a single system that tries to handle all cases above in one platform? |
| Answer | The strong preference is for a single system, but an integrated approach involving more than one system would be considered. |
| Question 26 | Please provide % breakdown of learner registrations in For-Credit vs. Non-Credit. |
| Answer | For-credit learners comprise virtually 100% of the students at the university. |
| Question 27 | How many courses do you run annually? |
| Answer | Approximately 2,400 courses annually. |
| Question 28 | How many certificates do you award annually? |
| Answer | We currently do not award certificates. A new Nursing certificate has been approved, but it will be several semesters before the first ones are awarded. At that point there might be 10-20 certificates awarded annually. |
| Question 29 | When do you hope to go live with a new system? |
| Answer | See page 16 of the RFP-2464: Product shall be installed, and all training complete for a Go-Live no later than April 1, 2025. |
| Question 30 | Has budget already been allocated for this endeavor? |
| Answer | Yes, budget has been allocated. |
| Question 31 | Please provide the # of business units/colleges at Francis Marion the Customer Relationship Management System will support, as well as the names of those business units/colleges. |
| Answer | Non-Academic: 1) Office of Admissions, 2) Office of Financial Assistance, 3) Center for Academic Success and Advisement (CASA), Academic: The university has four distinct academic units: 1) College of Liberal Arts and Sciences, 2) School of Business, 3) School of Health Sciences, 4) School of Education. Within these are academic departments. These academic areas would use the CRM system for academic advising and for graduate program admissions, which the Office of Admissions supports but for which it does not have primary responsibility. |
| Question 32 | Are there any integration requirements with other software platforms? |
| Answer | Yes, see Page 16 for the Relevant Systems Currently in Use by the University include, but are not limited to, that the proposed CRM shall successfully integrate with. Transition of data from our current CRM, AdmissionsPros, will also be required. |

Vendor: _____

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

Date: _____

END OF AMENDMENT 1