Mississippi State University
Request for Proposals (RFP) 23-77
Customer Relationship Management Software

ISSUE DATE: June 6, 2023

ISSUING AGENCY: Office of Procurement and Contracts

Mississippi State University
610 McArthur Hall
245 Barr Avenue
Mississippi State, MS 39762

Sealed Proposals, subject to the conditions made a part hereof, will be received **July 6, 2023, at 2:00 PM in the MSU Office of Procurement and Contracts, same address above**, for furnishing services and potentially, optional services as described herein.

IMPORTANT NOTE: Indicate firm name, and RFP number on the front of each sealed proposal envelope or package.

All inquiries concerning this RFP should be directed to:

Jennifer Mayfield
Office of Procurement and Contracts, (Same address above)
jmayfield@procurement.msstate.edu
662-325-2550

Any addendum associated with this RFP will be posted at
http://www.procurement.msstate.edu/procurement/bids/index.php located under RFP 23-77. It is the respondent's responsibility to assure that all addenda have been reviewed and if applicable, signed and returned.

1. UNIVERSITY OVERVIEW

Mississippi State University (MSU) is a comprehensive land grant university of 21,500+ students and approximately 5,000 faculty and staff. The main campus is located adjacent to the community of Starkville in northeast Mississippi, with a remote campus located in Meridian with an enrollment of around 700 students. Additionally, the university operates several remote agricultural experiment stations and has an Extension office located in each of the eighty-two Mississippi counties.

Additional information about MSU can be found at our website www.msstate.edu.

2. INVITATION TO SUBMIT PROPOSAL ON RFP

The Offices of Admissions and Scholarships, The Graduate School and Center for Distance Education at Mississippi State University are seeking Request for Proposals to purchase a Customer Relationship Management (CRM). This single software will allow these Offices to collect, input, and manage data on prospective students, applicants, admitted students, orientation registration, canceled, rejected and enrolled students. The CRM should facilitate communication with students at each stage (prospect, inquiry, applicant, admit, orientation registration, canceled, rejected and enrolled of the enrollment process. All records of the communication to the student should be easily accessible. The individual offices must be able to conduct business processes as separate units.

The CRM must contain multiple applications for admission that can be individually customized. The application workflow processes established for managing the completion of the application must be included, as well as the capability of communicating with students at various stages of the enrollment process. In addition, the CRM must contain a campus visitation program that includes communication coordination and registration for campus visits by the student. Campus recruitment events (Preview Days, Open Houses, New Student Orientation, etc.) must be managed within the CRM. For event communication, custom event related communication package based on a variety of event-related triggers must be included, as well as the ability to create invitation-only events and the ability to submit payment for events. The event communication must include a QR Code, specific event codes that can be emailed or texted to a student prior to an event as part of an event communication. The CRM must allow for email and SMS communication campaigns, as well as tracking emails/texts sent (open, click, etc.). A high school/community college counselor portal should be available in the CRM that is accessible to the counselor outside of the University single sign-on environment. The email system must integrate with Microsoft Outlook and allow for block sender (eliminate communication to specific prospect), the ability to send from multiple email accounts and the ability to change "from" description. The ability to track open/click rate and unique open/click rates must be available.

The CRM must have the ability to synchronize to social media accounts (Facebook, Twitter, Instagram, Snap Chat. etc.) directly. Emails received from another system can be forwarded to the CRM and matched against current records. The CRM must provide for robocalling.

The CRM must include territory management by recruitment/admissions staff, which includes: marking schools/colleges with-in a specific recruitment territory, access student data based upon a specific territory and send emails/texts to students by territory or by high school/college.

Include integrated GIS data to overlay with the student data, high school or college data of the surrounding area of the visit and census data from the American Community Survey.

The solution must include a rules editor which allows schools to build custom automations to support their processes.

3. SCOPE OF SERVICES REQUIRED

a) Technical Requirements
The following requirements are absolute minimums that a vendor and their proposed CRM must meet. If these requirements are not met, the proposal will be removed from consideration. The vendor must provide a detailed description of how each of these requirements will be met by the CRM.

- Vendor must be an Ellucian Banner collaborative development partner
- Integration with Banner SIS
- Integration with Parchment, Digital Credential Service
- Integration with Duolingo English Test
- Integration with IELTS results service
- Integration with World Education Services
- Integration with SCOIR
- Integration with TOEFL
- Integration with Common App
- CRM must provide a API service and STFP file transfer service within the CRM
- Support major browsers, specifically IE, Firefox, Safari, and Chrome
- Integrate with University's single sign on authentication system, CAS or Shibboleth
- Web-based login/access with VPN
- The CRM must provide for mobile capability.
- CRM provides both test and production environments with capability to transition objects (forms, queries, etc.) between both.

b) Users
- There must be no restrictions on the number of users in the system
- User permissions and accesses must be role based. Role-based permissions govern each user's rights to add, edit, and view information within the system.
- Users should be required to log into the CRM through MSU's single sign on authentication service. The only exception would be for external counselors.

c) Reporting/Forms, Custom Fields, Files
- Reports should be provided in multiple formats. Most reports, if not all, should be viewable on screen with options to download in Excel, PDF, CSV, Word (.doc/.rtf), or API access.
- Capability to upload artifacts or documents in multiple formats including but not limited to Excel (.xlsx, .xls), Word (.docx, .rtf), PDF, text, CSV formats, or API support. Capability to upload image files such as .jpg or .tif
- Custom reports should be available to be developed and accessed at all stages of the enrollment funnel, as well as be able to export data to Excel.
- Report generation/metrics for example year-to-year comparisons, statistical functions on data, upgrade cycles, system downtime.
- Provide end user query builder, SQL Expression Creation
- CRM must allow custom fields to be created within available database tables.
- CRM must include capability to create scheduled reports based off academic program, any fields, SQL query, and/or consistency.

d) Function
- CRM must have ability to view and track records of prospect, inquiry, applicant, admit, orientation registration, canceled, rejected and enrolled student status.
- CRM must offer a customizable internal application.
- CRM must provide a departmental workflow for review of applications and decisions to be entered.
- CRM must provide the view of test scores, as well as high school and college grade point average.
- CRM must provide the ability to import data from Ellucian Banner and export data to Ellucian Banner. Please describe how this can be accomplished.
- CRM must track activities/interests/origin and inquiry sources, as well as search by populations, organize populations into groups/folders, and template generation/organization. Must include additional fields like major, concentration, child of alumni, etc.
- Ability to build numerous behavior-driven communication streams and keep them separate for undergraduate, graduate and distance.
- CRM must provide ability to track multiple recruitment paths and applications.
- CRM must provide address verification at point of account creation.
- CRM must provide for application fees to be paid through the CRM.

- The CRM must interface with the Common Application
- The CRM must allow for the receiving of data (test scores and student data) from outside sources – College Board, ACT, NRCCUA, GRE, etc.
- The CRM must be able to accept payments for the campus recruitment events and orientation.
- The CRM must provide for parent/guardian contact information and for communication streams with those entities to be created and implemented.
- The CRM must provide for a status page for applicants to check received and missing application items, as well as receive an admission decision, allow to reply to the decision and pay confirmation/enrollment deposits.
- The CRM must store all materials/documents with the student record and are easily viewable across multiple devices with no browser-specific plugins needed.
- The CRM must provide a successful duplicate record management function.
- The CRM must provide integrated predictive modeling, featuring multiple machine learning algorithms integrated analytics, including Ping, which provides user-identifiable website tracking.
- The CRM must provide a mobile application for recruitment staff.
- The CRM must be scalable and perform well when exporting and importing records in quantities in excess of 200,000.Please describe the ability of the CRM to meet this requirement.
- CRM must provide robust email communication based on territory assignments and/or high school/academic program.
- CRM must provide extensive email tracking functions (open, click, etc.) per email campaign or constituency.
- CRM must provide the ability to have multiple email and/or form templates based off of constituency or academic program.
- CRM must provide transactional email communication capabilities.
- CRM must provide automated email and/or text communication based on academic program or other field criteria.
- CRM must provide emails in contract without additional charges per email.
- CRM must provide email and/or text personalization.
- CRM must provide capability to implement conditional logic when sending emails and/or text.
- CRM must provide the capability to automate field and/or status changes based on email transactions.
- CRM must provide the capability to track off campus recruitment travel (location, expenses, participants, etc.).
- CRM must provide reporting capabilities for trips based on constituency and/or academic program.
- CRM must provide capability to import/export data in various formats (CSV, SQL, etc.)

- CRM must provide name tag printing capabilities and templates directly from the CRM
- CRM must provide ability to allow additional and/or custom dataset creation with capability of making relationships between datasets.
- CRM must provide capability for record auditing (creation, edits, deletion, etc.).
- CRM must provide ability to set data retention policy (GDPR, FERPA, etc.).
- The vendor must provide a VPAT that confirms accessibility compliance that is defined in University policy 01.13.
- CRM must provide dynamic content based on student interest, academic program, term, student type, etc.

e) **System Maintenance and Support**
- System must be cloud based with a robust data security and backup plan. Provide applicable certifications such as SOC2, and HECVAT Lite.
- The vendor must implement software upgrades and updates to the system; however, allowing the University to implement these upgrades on its own timetable.
- The vendor should include initial training and provide additional training as needed.
- The vendor must provide email and phone support in addition to a trouble ticket system.
- The vendor must provide details for maintenance, support, and problem escalation procedures.
- System must be secure and meet all local, state and federal data security standards.
- The vendor solution must provide PCI compliant credit card processing.
- The vendor must provide the implementation plan and process.

4. INQUIRIES ABOUT RFP

Prospective respondents may make written inquiries concerning this request for proposal to obtain clarification of requirements. **Questions should be submitted either via a Word document or plainly typed in the email itself.** Responses to these inquiries may be made by addendum to the Request for Proposal (RFP). Please send your inquiries to Jennifer Mayfield via electronic mail at jmayfield@procurement.msstate.edu.

All inquiries should be marked "URGENT INQUIRY. MSU RFP 23-77"

5. ADMINISTRATIVE INFORMATION

a) **Issuing Office**

This RFP is issued by the following office:

Office of Procurement and Contracts
Mississippi State University

245 Barr Avenue, 610 McArthur Hall
Mississippi State, MS 39762

b) Schedule of Critical Dates

The following dates are for planning purposes only unless otherwise stated in this RFP progress towards their completion is at the sole discretion of the university.

RFP Posted	**June 6, 2023**
Questions from Vendors Due	**June 16, 2023**
MSU Q&A Response Due	**June 23, 2023**
Proposal Submission Deadline – 2:00 p.m.	**July 6, 2023**
Award Date (Estimated)	**October 31, 2023**
Contract Effective Date (Estimated)	**July 1, 2024**

6. PROPOSAL CONTENTS

This is a two-step RFP process. The technical proposals and the cost proposals are to be submitted in separate sealed envelopes. Indicate firm name, RFP# and word "Technical Proposal" on the front of the sealed technical proposal envelope or package. Indicate the firm name, RFP# and the word "Cost Proposal" on the front of the sealed proposal envelope or package.

At a minimum, the following items should be included in the contents of the Technical Proposal:

i) Cover letter, indicating the scope of the proposal. The letter should include an overview of the services being offered. The letter should include a statement of exceptions to any of the terms and conditions outlined in this RFP. (Cover letter should be no more than 3 pages in length.)

ii) Corporate Structure and Credentials

    (1) Number of years of experience
    (2) Staffing levels and support proposed
    (3) Examples of similar previous work.

iii) Operations and Ability To Perform

    (1) Provide operation plan. This should include, but not be limited to, acknowledgement and agreement with all requirements as well as explanations, where applicable, of the intended plan to achieve the requirements.
    (2) Describe how services will be provided to MSU.

  b) At a minimum, the following items should be included in the contents of the Cost Proposal:

    i) Fees for initial purchase of CRM (including all preparation, installation, rollout, training and first year maintenance and support). Pricing should also include the volume of texts and emails included.

    ii) Any annual maintenance, licensing, and support costs after initial purchase.

7. DISCUSSIONS/EVALUATION CRITERIA/AWARD PROCESS

MSU reserves the right to conduct discussions with any or all respondents, or to make an award of a contract without such discussions based only on evaluation of the written proposals. MSU reserves the right to contact and interview anyone connected with any past or present projects with which the respondent has been associated. MSU likewise reserves the right to designate a review committee to evaluate the proposals according to the criteria set forth under this section. MSU may make a written determination showing the basis upon which the award was made and such determination shall be included in the procurement file.

MSU reserves the right to award this contract in whole or in part depending on what is in the best interest of MSU with MSU being the sole judge thereof.

The evaluation factors set forth in this section are described as follows:

- The Vendor's ability to deliver an application meeting the overall objective and functions described in the RFP
- Competitive fees
- Availability and access technical support
- Vendor's experience with similar systems
- Compliance with applicable State and Federal laws and regulations
- The committee may invite finalists for interviews and/or presentations

Failure to attend a requested interview presentation before the committee may result in a proposal not being considered.

Upon award of contract(s), successful respondent(s) will be asked to provide a transition plan and timeline and obtain MSU's input and concurrence before moving forward.

Proposals will be scored based on the following weights (100 points total):

- Corporate Structure/Years of Experience/References – 20 pts
- Operation Plan/Ease of Use/Services Offered – 40 pts
- Fees – 40 pts.

8. PROPOSAL SUBMISSION

Proposals shall be submitted in two packages (envelopes or boxes) as set forth in Section 7. Please make sure that the RFP number is clearly visible on the outside of the package.

Technical Proposal – One (1) original and one (1) electronic copy (of the complete technical proposal in one pdf file on a flash drive) of parts 7(b)(i) (Cover Letter), 7(b)(ii) (Corporate Structure and Credentials), and 7(b)(iii) (Operations and Ability to Perform) should be sealed in a package with "Technical Proposal" in the lower left hand corner. Each submitted package should be a complete copy. The original shall be marked on the first page "Original".

Cost Proposal – One (1) original and one (1) electronic copy (of the complete cost proposal in one pdf file on a flash drive). Should be sealed in a package with "Cost Proposal" in the lower left-hand corner. Each submitted package should be a complete copy. The original shall be marked on the first page "Original".

The proposal package must be received on or before **2:00 p.m. on July 6, 2023**. It is the responsibility of the respondent to ensure that the proposal package arrives in the Procurement and Contracts office on-time. The proposal package should be delivered or sent by mail to:

> **Office of Procurement and Contracts**
> **Mississippi State University**
> **610 McArthur Hall**
> **245 Barr Avenue**
> **Mississippi State, MS 39762**

Your response must include the signature page included in this RFP (See Appendix A) and contain the signature of an authorized representative of the respondent's organization. The signature on the "Original" signature page should be in <u>blue</u> ink.

MSU reserves the right to reject any and all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal or all items bid if deemed in the best interest of the University to do so.

Proposals received after the stated due date and time will be returned unopened. Submission via facsimile or other electronic means will not be accepted.

9. PCI COMPLIANCE ISSUES (IF APPLICABLE)

The vendor must provide a PCI compliant processing environment using one of the approved options below. If the vendor is unable to fully adhere to one of these options, the proposal will be removed from consideration.

- **Option 1** – Integrate with MSU's existing third-party solution (NelNet Business Solutions – Commerce Manager), because all hardware, software and back end processing have been vetted and credit/debit card payments are automatically posted to Banner.

- **Option 2** – Use alternative third-party solution. Use a different MSU Merchant ID but same bank account.
  - Work with members of MSU's PCI Council and third-party PCI Compliance consultant to review business needs and proposed solution.
  - Ensure card transactions processed by university personnel are performed using a PCI-validated point to point encrypted (P2PE) solution. The solution must be listed on the PCI council's website (https://www.pcisecuritystandards.org), must not be expired, and devices to be used with the solution must have a PIN transaction security (PTS) expiration date at least 3 years past the date of installation.
  - Obtain the following solution information
  - Attestation of compliance (AoC) from all parties involved in handling or that affect the security of cardholder data.
  - Verify that all devices have a current PTS certification and have an expiration date at least 3 years past the installation date of the solution.
  - Obtain a data flow diagram showing where payment card data will be introduced to the proposed solution and all steps/hops it will take until payment information is delivered to the merchant processing bank. This will determine all of the service providers that must provide an AoC.
  - Require specific reporting requirements and interfaces to support Banner integration and automatic posting of credit/debit card payments to the ERP. The exact file layout will be provided upon request.

- **Option 3** – Use alternative third-party solution. Use vendor's Merchant ID.
  - Work with members of MSU's PCI Council and third-party PCI Compliance consultant to review the solution.
  - Ensure card transactions processed by university personnel are performed using a PCI-validated point to point encrypted (P2PE) solution. The solution must be listed on the PCI council's website (https://www.pcisecuritystandards.org), must not be expired, and devices to be used with the solution must have a PIN

transaction security (PTS) expiration date at least 3 years past the date of installation.
- o Obtain the following solution information
- o Attestation of compliance (AoC) from all parties involved in handling or that affect the security of cardholder data.
- o Verify that all devices have a current PTS certification and have an expiration date at least 3 years past the installation date of the solution.
- o Obtain a data flow diagram showing where payment card data will be introduced to the proposed solution and all steps/hops it will take until payment information is delivered to the merchant processing bank. This will determine all of the service providers that must provide an AoC.
- o Payments due MSU will be remitted on a predetermined basis, net of all applicable fees and merchant discounts. Banner integration not required.

10. TWO-PHASE, BEST AND FINAL OFFER

If the initial proposals do not provide MSU with a clear and convincing solution, or if MSU feels it is appropriate to offer the potential providers an opportunity to submit revised proposals, MSU reserves the right to use a two-phase approach and/or invite Best and Final Offers (BAFO). Based on the information obtained through the proposal submittals (Phase-One), MSU may choose a specific business model, and potential providers may be asked to submit revised proposals based upon that specific model.

The evaluation committee may develop, for distribution to the top-ranked firms, refined written terms with specific information on what is being requested as a result of information obtained through initial RFP submittal process. Proposers may be asked to reduce cost or provide additional clarification to specific sections of the RFP. Selected proposers are not required to submit a BAFO and may submit a written response notifying the solicitation evaluation committee that their response remains as originally submitted.

11. TERM OF CONTRACT

It is MSU's intention to enter into a five (5) year contract beginning July 1, 2024 and upon receipt of all required approvals with the option to renew for an additional five (5) year term.

MSU reserves the right to terminate this agreement with thirty (30) days-notice, by the Director of Procurement and Contracts via certified mail to the address listed on the signature page of this RFP (See Appendix A) if any of the terms of the proposal and/or contract are violated.

In the event the contractor fails to carry out and comply with any of the conditions and agreements to be performed under the specifications, MSU will notify the contractor, in writing, of such failure or default. In the event the necessary corrective action has not been

completed within a ten (10) day period, the contractor must submit, in writing, why such corrective action has not been performed. The University reserves the right to determine whether or not such noncompliance may be construed as a failure of performance of the contractor.

Termination of contract by contractor without cause can only occur with at least one-hundred and twenty (120) days-notice prior to the proposed termination of the contract.

In the event MSU employs attorneys or incurs other expenses it considers necessary to protect or enforce its rights under this contract, the contractor agrees to pay the attorney's fees and expenses so incurred by MSU.

12. ACCEPTANCE TIME

Proposal shall be valid for one-hundred and eighty (180) days following the proposal due date.

13. RFP CANCELLATION

This RFP in no manner obligates MSU to the eventual purchase of any services described, implied or which may be proposed until confirmed by a written contract. Progress towards this end is solely at the discretion of MSU and may be terminated without penalty or obligations at any time prior to the signing of a contract. MSU reserves the right to cancel this RFP at any time, for any reason, and to reject any or all proposals or any parts thereof.

14. INDEPENDENT CONTRACTOR CLAUSE

The contractor shall acknowledge that an independent contractor relationship is established and that the employees of the contractor are not, nor shall they be deemed employees of MSU and that employees of MSU are not, nor shall they be deemed employees of the contractor.

15. DISCLOSURE OF PROPOSAL CONTENTS

Proposals will be kept confidential until evaluations and award are completed by MSU. At that time, all proposals and documents pertaining to the proposals will be open to the public, except for material that is clearly marked proprietary or confidential.

IMPORTANT! The offeror/proposer should mark any and all pages of the proposal considered to be proprietary information which may remain confidential in accordance with Mississippi Code Annotated 25-61-9 and 79-23 1 (1972, as amended). Each page of the proposal that the proposer considers trade secrets or confidential commercial or financial information should be on a different color paper than non-confidential pages and be marked in the upper right hand corner with the word "CONFIDENTIAL."

Failure to clearly identify trade secrets or confidential commercial or financial information will result in that information being released subject to a public records request.

16. OTHER CONTRACT REQUIREMENTS

Award Terms: This contract shall be awarded at the discretion of the University based on the capabilities and overall reputation of the Supplier, as well as the cost. Acceptance shall be confirmed by the issuance of a contract from the University.

Standard Contract: The awarded contractor(s) will be expected to enter into a contract that is in substantial compliance with MSU's standard contract http://www.procurement.msstate.edu/pdf/standard_rfp_contract.pdf. Proposal should include any desired changes to the standard contract. It should be noted that there are many clauses which the MSU cannot change (see Standard Addendum http://www.procurement.msstate.edu/contracts/standardaddendum.pdf) Significant changes to the standard contract may be cause for rejection of a proposal.

The Procurement Process: The following is a general description of the process by which a firm will be selected to fulfill this Request for Proposal.

- Request for Proposals (RFP) is issued to prospective suppliers.
- A deadline for written questions is set.
- Proposals will be received as set forth in Section 8.
- Unsigned proposals will not be considered.
- All proposals must be received by MSU no later than the date and time specified on the cover sheet of this RFP.
- At that date and time, the package containing the proposals from each responding firm will be opened publicly and the name of each respondent will be announced.
- Proposal evaluation: The University will review each proposal.
- At their option, the evaluators may request oral presentations or discussions for the purpose of clarification or to amplify the materials presented in the proposal
- Respondents are cautioned that this is a request for proposals, not a request to contract, and the MSU reserves the unqualified right to reject any and all proposals when such rejection is deemed to be in the best interest of the University.
- The proposals will be evaluated according to the criteria set forth in Section 7.

APPENDIX A: SIGNATURE PAGE

Provide information requested, affix signature and return this page with your proposal:

Name of Firm: _____

Complete Address: _____

_____

Telephone Number: _____

E-mail Address: _____

Authorized Signature: _____

Printed Name: _____

Title: _____