



Request for Proposals Amendment 2

Solicitation Number: USC-RFP-3565-AS
 Date Issued: January 2, 2020
 Procurement Officer: Ashley Kennedy-Shell
 Phone: 803-777-1015
 E-Mail Address: abk@mailbox.sc.edu
 Mailing Address: 1600 Hampton Street; Ste 606
 Columbia, SC 29208

DESCRIPTION: Provide Customer Relationship Management (CRM) Software Solution

USING GOVERNMENTAL UNIT: UNIVERSITY OF SOUTH CAROLINA CAMPUSES: AIKEN & BEAUFORT

The Term "Offer" Means Your "Bid" or "Proposal". Your offer must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior. See "Submitting Your Paper Offer or Modification" provision.

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

MAILING ADDRESS:
 University of South Carolina – Purchasing Department
 1600 Hampton Street, Suite 606
 Columbia SC 29208

PHYSICAL ADDRESS:
 University of South Carolina – Purchasing Department
 1600 Hampton Street, Suite 606
 Columbia SC 29208

SUBMIT OFFER BY (Opening Date/Time): January 7, 2020 @ 2:30 (See "Deadline For Submission Of Offer" provision)

QUESTIONS MUST BE RECEIVED BY: December 5, 2019 at 11:00 AM (EST) (See "Questions From Offerors" provision)

NUMBER OF COPIES TO BE SUBMITTED: 1 (one) Original Hard Copy each for Technical & Price Proposals;
8 (eight) Digital versions of technical proposal on USB drive;
 1 (one) Digital version of Price Proposal on USB Drive; and
 1 (one) each Digital version(s) of redacted Technical & Price proposal on USB Drive

CONFERENCE TYPE: Not Applicable
DATE & TIME:

(As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions)

LOCATION: Not Applicable

**AWARD &
AMENDMENTS**

Award will be posted on 02/19/2020. The award, this solicitation, any amendments, and any related notices will be posted at the following web address: <http://www.procurement.sc.gov>

You must submit a signed copy of this form with Your Offer. By signing, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of ninety (90) calendar days after the Opening Date. (See "Signing Your Offer" provision.)

NAME OF OFFEROR

(full legal name of business submitting the offer)

Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. 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.

AUTHORIZED SIGNATURE

(Person must be authorized to submit binding offer to contract on behalf of Offeror.)

DATE SIGNED

TITLE

(business title of person signing above)

STATE VENDOR NO.

(Register to Obtain S.C. Vendor No. at www.procurement.sc.gov)

PRINTED NAME

(printed name of person signing above)

STATE OF INCORPORATION

(If you are a corporation, identify the state of incorporation.)

OFFEROR'S TYPE OF ENTITY: (Check one)

(See "Signing Your Offer" provision.)

☐ Sole Proprietorship ☐ Partnership ☐ Other _____
☐ Corporate entity (not tax-exempt) ☐ Corporation (tax-exempt) ☐ Government entity (federal, state, or local)

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)
	<div style="display: flex; justify-content: space-between;"> Area Code - Number - Extension Facsimile </div>
	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	____ Order Address same as Home Office Address
____ Payment Address same as Notice Address (check only one)	____ 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
1	12/23/2019						
2	01/03/2020						

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 (SEP. 2009): 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. **ALL THE PREFERENCES MUST BE CLAIMED AND ARE APPLIED BY LINE ITEM, REGARDLESS OF WHETHER AWARD IS MADE BY ITEM OR LOT. VENDORS ARE CAUTIONED TO CAREFULLY REVIEW THE STATUTE BEFORE CLAIMING ANY PREFERENCES. THE REQUIREMENTS TO QUALIFY HAVE CHANGED. IF YOU REQUEST A PREFERENCE, YOU ARE CERTIFYING THAT YOUR OFFER QUALIFIES FOR THE PREFERENCE YOU'VE CLAIMED. IMPROPERLY REQUESTING A PREFERENCE CAN HAVE SERIOUS CONSEQUENCES.** [11-35-1524(E)(4)&(6)]

PREFERENCES - ADDRESS AND PHONE OF IN-STATE OFFICE: Please provide the address and phone number for your in-state office in the space provided below. An in-state office is necessary to claim either the Resident Vendor Preference (11-35-1524(C)(1)(i)&(ii)) or the Resident Contractor Preference (11-35-1524(C)(1)(iii)). Accordingly, you must provide this information to qualify for the preference. An in-state office is not required, but can be beneficial, if you are claiming the Resident Subcontractor Preference (11-35-1524(D)).

____ In-State Office Address same as Home Office Address
 ____ In-State Office Address same as Notice Address **(check only one)**

QUESTIONS FROM OFFERORS - AMENDMENT (JUN 2017)

The solicitation is amended as provided herein. Information or changes resulting from questions will be shown in a question-and-answer format. All questions received have been reprinted below. The “state’s response” should be read without reference to the questions. The questions are included solely to provide a cross-reference to the potential offeror that submitted the question. Questions do not form a part of the contract; the “state’s response” does. Any restatement of part or all of an existing provision of the solicitation in an answer does not modify the original provision except as follows: underlined text is added to the original provision. Stricken text is deleted. [02-2A097-1]

PURPOSE OF AMENDMENT

The purpose of Amendment 2 is to increase the number of submissions required for evaluation; and to revise the script required for offerors who are offered an opportunity to provide oral presentations. The script is provided on Page 4 of this amendment document. No other changes to oral presentations shall be made.

SCRIPT FOR ORAL PRESENTATIONS

The demonstrations are an opportunity to expand on the proposal and provide the University with examples of how the software meets or exceeds the requirements of the request for proposals. The demonstrations should show real interactions with the system and not just screenshots.

Please provide the following in the demonstrations to the University:

1. Brief overview of how the product meets the minimum requirements of Section III of the Request for Proposals.
2. Examples of ease of system use for students, staff and faculty including a demonstration of a student self-entered inquiry and a staff entry of a student inquiry
3. In addition to overviews provided in item #1, demonstration of the following interactions:
 - a. Communication flow (letter, text, and e-mail generation examples)
 - b. Upload of external lists
 - c. Reporting and dashboard functions
 - d. Creating various level applications (graduate, undergraduate, high school dual enrollment, etc.)
 - e. Flow of student information through the CRM
 - f. How application data would be processed and translated to SIS (Ellucian, in this case)
 - g. Fee collection and available waiver processes

Questions and Answers Provided in Amendment 1

Any questions resulting directly from Amendment 1 must be provided by e-mail to the Procurement Officer by January 2 at 11:00 am. Answers to Bidder questions are as follows:

Question 1: Being based out of another State, do we still need to be registered with South Carolina?

Answer: Yes, you will need to be registered with South Carolina.

Question 2: On Page 9 under III. SCOPE OF WORK/SPECIFICATIONS > B. General Scope of Project > System Requirements - CRM only > #3. Section B Requirement 3: Regarding letter/physical mail generation- (on our Product Roadmap for Q1 2020) Would that disqualify us since that feature is not currently live? Feature would become available upon completion of implementation. (which requires 4-6 months)”

Answer: The requirements are as stated in Section III of the solicitation document. Offerors must demonstrate that the proposed solutions contain all features; and shall be evaluated accordingly.

Question 3: Will the University’s be conducting a Pre-Bid/Proposal Conference? If so, are there any dates/locations available?

Answer: There is no Pre-Proposal Conference scheduled for this solicitation.

Question 4: Will USC Aiken and USC Beaufort be utilizing one central system between the two campuses, or is the goal to have two separate systems with their own respective implementations?

Answer: There shall be two systems. Please refer to page 19 of the solicitation, which states: The Price Proposal shall assume that the offer is for one (1) school (either Aiken or Beaufort) and shall ultimately offer the same price for each of them.

Question 5: If the end result of the Solicitation is two systems/implementations, will that result in two separate contracts or one joint contract shared/split between the two campuses?

Answer: Please refer to page 22 of the original solicitation, which states:

AWARD CRITERIA – PROPOSALS (JAN 2006)

Award will be made to the highest ranked, responsive offer and responsible Offeror(s) whose offer(s) is/are determined to be the most advantageous to the State. [06-6030-1]

AWARD TO MULTIPLE OFFERORS (JAN 2006)

Award may be made to more than one Offeror, or the first and second highest ranked.. [06-6035-1]

Question 6: Regarding the price proposal, if the final requirements/licensing needs differ between the Aiken and Beaufort campuses in a way where the price would not be the exact same for each campus, is this acceptable (assuming this being properly detailed in the offer)?

Answer: Please refer to page 23 of the solicitation:

UNIT PRICE GOVERNS (JAN 2006)

In determining award, unit prices will govern over extended prices unless otherwise stated. [06-6075-1]

Question 7: What is the budget for this project for each campus?

Answer: The University will not disclose this information at this time.

Question 8: For Offerers invited to provide demonstrations, will there be one for both campuses, or one for each?

Answer: One

Question 9: Can demonstrations be provided in person vs teleconference?

Answer: In-person presentations is preferred, but if that is problematic, we may consider a web presentation.

Do the Universities require live demonstrations vs recordings?

Answer: Live demonstrations

Question 10: Do the Universities have a target go-live date for the project?

Answer: The answer for this question may be found on page 15 of the original solicitation:

J. Milestone Dates

The University requires the solution to go live (simultaneously with EMAS for 4 months) June 1, 2020. Testing from March 1 – May 31, 2020.

Question 11: What functional/operational issues with the current CRM and/or online application is the College seeking to improve with a new system?

Answer: The answer to this question may be found in Section III, Scope of Work. This includes but is not limited to the following sections:

- F. Current Level of Performance
- G. Minimum Level of Success

Question 12: Is there a phasing plan for the project to cover different departments and aspects of the solution? If so, can this please be shared?

Answer: The universities are open to potential phasing, however, all inquiry, application, and enrollment modules/solutions must be fully implemented and operational by June 1, 2020

Question 13: What staff and resources does the College 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)?

Answer: The universities have limited technology support for implementations. While each campus and the UofSC system will have technology staff assigned, we will rely upon the expertise of the vendor for data integration.

Question 14: How is the University currently integrating between EMAS and Banner?

Answer: The daily bridge – an export and manual import process daily.

Question 15: Is there a requirement for some implementation meetings to occur on-campus?

Answer: The universities prefer on campus implementation assistance (at least, in part) due to the close work which will need to occur between vendor and multi-campus technology staff and UofSC system technology staff.

Question 16: Do the Universities have a preference between DYI solutions requiring the University's technical resources to self-implement the solution or solutions that offer managed implementation services?

Answer: The universities preferred a managed implementation by the vendor. However, various options can be presented.

Question 17: What University staff have been/will be assigned to the project for implementation?

Answer: The answer to this question may be found on page 15 of the solicitation: Contracting Officer Representative.

Question 18: For USC Aiken, what is the University's annual inquiry volume?

Answer: With prospects and inquiries, we project a 50,000 volume (and growing).

Question 19: For USC Aiken, what is the University's annual application volume?

Answer: Including all levels, we project 5,000+ with desired growth.

Question 20: For USC Aiken, how many system users would be admin/power users who may need full system access and/or mass communication access?

Answer: Admin/power users potentially 5 people.

Question 21: For USC Aiken, how many additional users would be basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access? (Note: this wouldn't include admins/power users)

Answer: Estimate of 30, but this will vary based upon features of system.

Question 22: For USC Beaufort, what is the University's annual inquiry volume?

Answer: With prospects and inquiries, we project a 50,000 volume (and growing)

Question 23: For USC Beaufort, what is the University's annual application volume?

Answer: 2500

Question 24: For USC Beaufort, how many system users would be admin/power users who may need full system access and/or mass communication access?

Answer: 5

Question 25: For USC Beaufort, how many additional users would be basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access? (Note: this wouldn't include admins/power users)

Answer: 30

Question 26: Is there a preference/requirement for solutions that offer unlimited email sending without per-contact/message costs?

Answer: Yes, unlimited is required.

Question 27: Is there a preference/requirement for solutions that offer unlimited text messaging without per-contact/message costs?

Answer: Yes, unlimited is highly preferred

Question 28: Has either University seen demos of any potential CRM solutions or related technologies in the last 12 months? If so, which ones?

Answer: No

Question 29: Regarding USC Aiken: How many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher level functions) do you anticipate will access the solution?

Answer: Approximately 5 (as a close estimation). We do not wish it to be limited to that number.

Question 30: Regarding USC Aiken: How many limited access users (only able to update contact data fields, add notes, and run pre-written reports) do you anticipate will access the solution?

Answer: Estimate of 30, but this will vary based upon features of system.

Question 31: Regarding USC Aiken: Do you expect to use the chat feature? If so, how many chat users do you anticipate will access the solution?

Answer: Yes, we expect to use chat functionality. An estimate of campus users might be 20, but this is only an estimate.

Question 32: Regarding USC Aiken: How many student applications do you receive annually?

Answer: Including all levels, we project 5,000+ with desired growth.

Question 33: Regarding USC Beaufort: How many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher level functions) do you anticipate will access the solution?

Answer: Approximately 5 (as a close estimation). We do not wish it to be limited to that number.

Question 34: Regarding USC Beaufort: How many limited access users (only able to update contact data fields, add notes, and run pre-written reports) do you anticipate will access the solution?

Answer: Estimate of 30, but this will vary based upon features of system.

Question 35: Regarding USC Beaufort: Do you expect to use the chat feature? If so, how many chat users do you anticipate will access the solution?

Answer: Yes, we expect to use chat functionality. An estimate of campus users might be 20, but this is only an estimate.

Question 36: Regarding USC Beaufort: How many student applications do you receive annually?

Answer: 2500

Question 37: How many users will there be for the new CRM system?

Answer: For Aiken, approximately 5 admin users and 30 campus users. These are only estimates and we hope not to be limited. For Beaufort approximately 5 admin users and 30 campus users. These are only estimates and we hope not to be limited.

Question 38: Will some users only need limited functionality? If so, how many of these types of users will there be and what types of tasks will they need to accomplish?

Answer: For Aiken, see answer above. Admins will obviously maintain and coordinate, but many users across campus will access the system to check on

various status items as well as to coordinate communication to various populations.

For Beaufort, same answer as Aiken

Question 39: Approximately how many unique email addresses (contacts) will each school include in email marketing campaigns annually? We are mainly 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: For Aiken, including purchased names, the number of unique emails could exceed 50,000.

Question 40: Regarding SMS capability, is there an estimated number of text messages that will be sent to prospects, applicants, admitted students, etc?

Answer: There is no estimate as we prefer unlimited ability to communicate.

Question 41: Will the new CRM system have separate instances for the two universities, or will they share one instance?

Answer: Two instances IF the same company wins the bid for both universities.

Question 42: Scope of Work section G, number 2a mentions the ability to “robo-call”. Can you elaborate on your requirements for these robo calls?

Answer: Universities seek unlimited ability to utilize robo-calling for the purposes of event reminders, deadline reminders, event confirmations, and other related calls. For our purposes, robo-calling means the ability to send mass calls (similar to political campaigns) to those in our admissions universe.

--- End of Amendment 2 ---