ATHENS STATE UNIVERSITY

300 North Beaty Street, Athens, AL 35611

Bid Number: 32024

Opening Date/Time: April 8, 2024, 2:00 p.m.
Opening Location: Founders Hall, Room 109

March 12, 2024

Introduction / Objectives

Athens State University seeks bids for a Customer Relationship Management (CRM) software in order to provide improved recruiting and marketing communications to potential students. This CRM will also integrate with university information systems such as Canvas (LMS), Ellucian Banner (SIS), Outlook 365 for email and calendar, etc. through single sign-on access.

General Information

Athens State University Background

Athens State University is a public institution that offers exclusively upper-division and graduate coursework.

Current Vendors / Software

Student Information System	Banner
Campus Financial System	Banner
Learning Management System	Canvas
Student Success System	EAB Navigate
Student Career Management System	Handshake
Pathify	Campus Portal
Admissions/Recruitment CRM	Admissions Pro

Proposals

Project Timeline

RFP Issued	March 12, 2024
Declaration of Intent to Bid	March 18, 2024
Deadline for Vendor Questions	March 22, 2024
Response for Vendor Questions Posted	April 3, 2024
Proposals due (bid opening-2:00 p.m.)	April 8, 2024
Recommendation of Successful Proponent	No later than April 30, 2024
Start Project	Approximately the week of May 13, 2024
Project Completion	No later than October 1, 2024

Procedure for Submission of Proposals

Vendors planning to submit a proposal must declare their intent to bid via email to Mike McCoy, Vice President for Financial Affairs at mike.mccoy@athens.edu with a copy to barbara.ferguson@athens.edu , by March 18, 2024. Only vendors who declare their intent to bid will be updated on any potential amendments and official answers to vendor questions.

VENDOR QUESTIONS

Preliminary questions to this bid document should be written and emailed to Mike McCoy, Vice President for Financial Affairs at mike.mccoy@athens.edu with a copy to barbara.ferguson@athens.edu, by March 22, 2024 . The University will respond in writing and make questions and answers available to all vendors who have declared an intent to bid by April 3, 2024.

Participating bidders shall make all investigations at their own cost, to thoroughly inform themselves regarding the scope of services referenced in the bid document. No plea of ignorance by those responding to the bid or by the successful company, of conditions that exist or that may hereafter exist as a result of failure or omission on the part of the company to make the necessary examinations and investigations, or failure to fulfill the requirements of the contract documents, will be accepted as a basis for varying the requirements of the bid document or to the contract, including compensation, with the successful company.

SOLE POINT OF CONTACT

The University's sole point of contact for all matters relating to this bid is:

Mike McCoy, Vice President for Financial Affairs
300 North Beaty Street
Athens, AL 35611
256-216-3303
mike.mccoy@athens.edu copy to barbara.ferguson@athens.edu

Vendor Criteria and Evaluation

Required Components	Maximum Points
User experience/Navigation	25
Implementation, Testing and Training Plan	25
Systems Integration	25
Communications Systems	25
Document Management	25
Analytics	25
TOTAL	150

PRESENTATION, DEMONSTRATION and INTERVIEW

Bidders demonstrating excellent responses to the technical and functional requirements may or may not be invited to make a presentation and demonstration and to discuss their proposal. Athens State will notify the bidders and schedule the time and date. If requested, the presentation will provide an opportunity for each bidder to clarify or elaborate on their proposal, but **shall in no way change their original proposal**. All costs associated with the bidder's presentation will be borne by the bidder.

Proposal Format and Content

Response Format:

- Submit four (4) printed copies of your proposal. Each copy shall contain the original manual signature of the authorized person signing the proposal. Failure to include original signed copies may be grounds for rejection of your proposal without further evaluation.
- Proposals are to be mailed in a sealed envelope which bears the above bid number and opening date on the outside of the envelope. All responses are to adhere to the format outlined in this document as well as the enclosed **General Conditions for Purchasing Solicitations**
- Your response shall include the information and required submittals described in the Response Content section, tabbed and numbered as shown below, with all information appearing in the tab in which it was requested.
- All information and required submittals requested shall be included in your written response. Responses shall not refer the university to electronic media such as websites, CDs, disks, or tapes to obtain the required information or submittals. Proposal copies on the USB flash drives must be duplicates of the printed proposal and not contain additional information.
- Information submitted that is not requested by the university may be considered to be supplemental, not subject to evaluation.
- If there is any information or required submittals which due to size or binding cannot be incorporated following the proper tab, you must provide information following the numbered tab, indicating where the information can be found in your response.

Response Content:

- **Section 1: Executive Summary** Include an executive summary of your proposal which demonstrates an understanding of Athens State University's needs, provides an overview of the proposed solution, and illustrates what differentiates your organization from other CRM vendors. Athens State is seeking a vendor with a minimum of five years' experience in Higher Education and a commitment to this market. Please detail future initiatives relative to your system.
- **Section 2: Contact Information** List contact name(s) and titles of the individual(s) responsible for the company's proposal and negotiation during this bid process.
- **Section 3: Response to Specifications** Respond to each specification listed in Appendix A at the end of this document. Use the provided codes for each item and add comments as needed.
- **Section 4: Customers in Alabama** Include a listing of all the company's current higher education customers in Alabama. This should include the name, address, telephone and email of the client contract administrator. If no customers in Alabama exist, please provide information on the ten (10) closest customers by geographic distance. These references will be asked to attest to their experience with the proposed CRM.

- **Section 5: Qualification Statement** Include a completed Qualification Statement from Appendix B.
- **Section 6: Alabama Bid Compliance Form** Include the completed State of Alabama bid compliance form from Appendix C.
- **Section 7: Athens State University Vendor Form** Include a completed Athens State University Form found in Appendix D.
- **Section 8: Higher Education Cloud Vendor Assessment Tool (HECVAT)** Include a completed, current HECVAT assessment. The lightweight version of the form can be found under "resources" here: https://library.educause.edu/resources/2020/4/higher-education-community-vendor-assessment-toolkit
- **Section 9: Cost Proposal** Provide a project budget showing all estimated costs over the five (5) years of the contract. See Appendix E for the Cost Proposal Form to be completed. **All anticipated costs must be included on this cost form.** Vendors will not have the opportunity to provide alternate pricing during the selection process.

Before a purchase order will be issued, the **awarded** vendor will be required to submit to Athens State University the following documents, completed and properly executed:

- State of Alabama Vendor Disclosure
- State of Alabama Immigration Law Certificate of Compliance

CERTIFICATION PURSUANT TO ACT NO. 2006-557

ALABAMA LAW (SECTION 41-4-116, CODE OF ALABAMA 1975) PROVIDES THAT EVERY BID SUBMITTED AND CONTRACT EXECUTED SHALL CONTAIN A CERTIFICATION THAT THE VENDOR, CONTRACTOR, AND ALL OF ITS AFFILIATES THAT MAKE SALES FOR DELIVERY INTO ALABAMA OR LEASES FOR USE IN ALABAMA ARE REGISTERED, COLLECTING, AND REMITTING ALABAMA STATE AND LOCAL SALES, USE, AND/OR LEASE TAX ON ALL TAXABLE SALES AND LEASES INTO ALABAMA. BY SUBMITTING THIS BID, THE BIDDER IS HEREBY CERTIFYING THAT THEY ARE IN FULL COMPLIANCE WITH ACT NO. 2006-557, THEY ARE NOT BARRED FROM BIDDING OR ENTERING INTO A CONTRACT PURSUANT TO 41-4-116, AND ACKNOWLEDGES THAT THE AWARDING AUTHORITY MAY DECLARE THE CONTRACT VOID IF THE CERTIFICATION IS FALSE

Appendix A: Specifications for bid #32024

Please respond to each item below with the appropriate code (if applicable) and any relevant comments. Comments may be provided separately if numbered correctly, as presented in the table below.

Code

A = This feature is available as part of the system at no additional cost.

D = It is in development and will be released by __________________.

N = This feature is not available nor planned for future development.

		Code	Comment
1	**Technical Requirements**		
1.1	Cloud hosted solution; Define the environment required to run the software. Define the hardware and software requirements/considerations to operate/interface the system as proposed. Describe your hosted and Software as a Service (SaaS) model if applicable.		
1.2	For hosted or SaaS environments, outline uptime and downtime and any SLA agreements.		
1.3	Detail how the database can be queried and custom reports can be requested such as creating custom fields, counselor assignments, application questions, etc..		
1.4	Is remote administration offered		
1.5	Are test, development, and production instances available -- provide details		
1.6	Discuss data integrity procedures		
1.7	Detail your out-of-box CRM solution. (Be sure to include specific release/version being offered.)		
1.8	What are the hardware/software/browser requirements of functional users' desktop and/or laptop computers		
1.9	What are the requirements for access using mobile devices		
1.10	Explain how you provide seamless integration to interfacing systems on multiple and diverse platforms. Describe the technology used		
1.11	Detail your Banner SIS interface and whether it is a standard part of your solution or customized and whether it is batch or real-time. If such an interface does not exist include the estimated cost of providing this function in your pricing proposal. This is a mandatory requirement		
1.12	Detail how such the Banner interface will meet the requirement of not negatively impacting or slowing SIS performance		

1.13	Explain your past success(es) with interfacing your CRM solution with Banner. Successes are defined as Higher Education clients who are live and using your CRM solution that is the same or very similar to the solution being proposed. What was the most difficult implementation and why?		
1.14	Detail the specific scenarios that would negatively affect the system's performance, cause the CRM solution to improperly function, or cease to function		
1.15	We seek a solution that may allow for a separate repository of data or data that can be interfaced with Banner. Explain what solutions you offer, whether you recommend one solution vs. another and why; what hardware/storage considerations are needed.		
1.16	We seek a CRM solution with a two-way interface with the SIS. Does the CRM solution offer a means to define frequency of a two-way interface with the SIS?		
1.17	We require a CRM solution that allows for real-time and/or batch/bulk data transfers to other systems via an API and/or software developer's tool kit for use by institution's IT staff. Describe how you deliver this solution. This is a mandatory requirement.		
1.18	Demonstrate/explain how your solution distributes volumes of outbound email with merged data and personalization.		
1.19	What mobile platforms are supported by the CRM solution? How are mobile capabilities implemented? (i.e. mobile-enabled, apps, etc.) How are new mobile capabilities developed? By whom?		
1.20	Identify which components of your products or services are provided by third-party technology partners. This includes OEM software, hosting, et al. Provide the third-party technology partner(s) name(s), address(es) and contact(s), as well as explain additional costs or fees associated with the components		
1.21	What storage/memory requirements are required to archive all channels of communications?		
1.22	Does your CRM solution use a single database instance (as opposed to multiple instances) that can be accessed and maintained by all departments/programs, offices etc. across the enterprise?		

1.23	Does your CRM solution manage the full student life-cycle in a single system? Explain how your solution can integrate marketing, recruitment, and retention activities		
1.24	How often is the software updated and releases made available? What is the lag time between new releases of software and updates of the documentation? Describe how patches, updates, and releases are covered under contract. Who is responsible for installing patches, updates and releases?		
1.25	Is the proposed solution built on a single code base? If not, describe the various proposed solutions?		
1.26	Define support and maintenance provided; Define phone and web support provided and any priority system to provide for urgent support, hours of operation, location of support services, and any plans to change hours of operation		
1.27	Explain how your system provides user-friendly display of information via graphical user interfaces		
1.28	Explain how the user interface may be customized to specific user groups		
1.29	Explain how configurable dashboards for different departments are provided that gives control over data access and features		
1.30	How many languages does your solution support? Please detail		
1.31	What is the maximum number of concurrent users logged in simultaneously that your system can support? Describe how your system defines concurrent users		
1.32	Does your solution have published open API's, support XML or ODBC data sharing?		
1.33	Does your solution support a CAS authentication model for SSO capabilities? If not, what are the options?		
1.34	Do you offer a comprehensive data dictionary of the database?		
1.35	Do you offer the ability to add fields and or tables to the database?		
1.36	Do you offer the flexibility to create user defined fields as required?		
1.37	Do you offer administrator ability to monitor system performance?		

1.38	Do you have tools and procedures for load testing?		
1.39	Provide a roadmap of your hardware/software solutions that reflects their present states as well as future states for at least the next 18 to 24 months		
1.40	Detail the ability to import student/prospect data from external systems such as external databases, .csv files, etc.		
1.41	Detail the ability to associate and store incoming data files, documents, PDF files, images, .wav files, etc., with students and applicants		
1.42	Explain how the CRM can be integrated with the public facing web site and the campus portal		
2	**Access and Permissions**		
2.1	Explain how access is granted to the CRM system		
2.2	Explain the ability to maintain a complex organization hierarchy (department mapping) for defining the appropriate roles and permissions.		
2.3	Explain your authentication method for users. Explain how permissions are established and controlled		
2.4	Explain how secure, off-campus, remote access is accomplished. Most if not all operations should be available via a web interface.		
2.5	Describe the audit trail capabilities of the system (auditing from within the applications as well as outside the application including logging functionality of database changes by end user).		
2.6	Provide details and circumstances where customers experienced data loss. Provide details of your policy on loss prevention. What is the recovery process? How often is it tested?		
2.7	Detail your intrusion protection procedures. How do you ensure secure transmission of data?		
2.8	Describe how you achieve ADA compliance. If a VPAT is available please include in your response		
3	**Recruiting, Admissions and Advising**		
3.1	How many constituent types are permitted and how are they defined?		
3.2	Describe how portal views can be configured for each type of constituent		
3.3	Describe the ability to use different channels of communication (chat, outbound and inbound emails, letters, postcards, inbound and outbound phone calls, web, fax, etc.) to facilitate		

	individualized communications to targeted or segmented constituents.		
3.4	Can the system create, edit, test, query, schedule and automatically send and report 150,000 or more recruitment and admissions targeted and segmented emails per year?		
3.5	Can the system format, edit, test, query, schedule and automatically output 300,000 or more letters and other print materials to be mailed?		
3.6	Does the system have the ability to input conditional content based on data properties into emails, letters, postcards and SMS?		
3.7	Does the system have the ability to personalize subject line and email content?		
3.8	Does the system have controls to allow functional users or administrators to increase or decrease the amount of emails being sent by the system?		
3.9	Does the system have the ability to easily and quickly set up web-based applications and forms for recruitment, admissions and marketing initiatives to collect initial or additional student data?		
3.10	Does the system use graphic rich/html emails?		
3.11	Can the system stop communications or shift to alternate campaigns when certain criteria are met (e.g. a student submits an application), while eliminating duplicate communications?		
3.12	Does the system provide a campaign building sequence that is presented in a graphical or Visio style workflow?		
3.13	Does the system provide a drip marketing feature that allows for the timing of messages to follow a predetermined path in combination with the ability to send emails/other correspondence based on specific behaviors, actions or status of the prospect?		
3.14	Does the system have evaluation criteria to determine a student's likelihood of enrollment to trigger targeted responses?		
3.15	Explain the Management of email and mail opt-outs.		
3.16	Explain how temporary and permanent email bounce backs are handled.		
3.17	Explain the ability to track history of admission decisions and associated dates		
3.18	Does the system provide address verification and standardization for address information entered?		

3.19	Does the system provide on-screen and exportable tele-counseling call lists for admissions advisors?		
3.20	Does the system provide Integration, monitoring and tracking of social media interactions with varied constituents and social media networks?		
3.21	Does the system provide 2-way SMS text messaging to communicate with various constituents?		
3.22	Does the system provide the ability to assign geographic and demographic information about prospects and applicants, and utilize this information in customized marketing plans?		
3.23	Does the system provide the ability to track the individual's level of interest in the institution, and utilize this information in marketing and communication plans?		
3.24	Does the system provide the ability to identify special academic programs or services for an individual and whether they have been offered, accepted or rejected?		
3.25	Does the system provide the ability to track activities, interests, work experience, volunteer activities, leadership activities, legacy information, first-generation college students, and other demographic information and utilize that information in communication and marketing plans?		
3.26	Does the system provide the ability to create, audit, monitor, track, report on and analyze communication outputs (i.e. letters successfully printed, total emails sent/received/opened/link click thrus, etc.)?		
3.27	Detail how the solution handles job scheduling, printing and system backup/recovery.		
3.28	Does the system provide the ability of the system to incorporate testing score loads from GMAT, GRE, TOEFL, Duolingo English Test, etc.		
3.29	Does the system offer web-based/online inquiry forms that load to the CRM solution?		
3.30	Does the system offer web-based/online application for admission forms that load to the CRM solution?		
3.31	Does the system have the ability to save and complete ADM application at a later date?		
3.32	Does the system support uploading attachments to applications, such as transcripts, resumes, essay questions, etc.?		
3.33	Does the system have intelligent status trackers to determine the status of each application and alert candidates to incomplete portions?		

3.34	Does the system have the ability to prevent or eliminate duplicate applications for the same student within the same application term?		
3.35	Does the system provide automated workflows that can be determined for different application forms, according to applicant type with unique filtering options?		
3.36	Does the system provide the ability to automate assignment of inquiry/lead, based on territory or other criteria?		
3.37	Does the system provide the ability to edit student record in CRM system, with frequency and business rule option to pass edited information back to the SIS, Ellucian Banner?		
3.38	Does the system Recognize and prioritize constituents' multiple addresses (permanent, temporary, etc.), phone numbers (home, cell, etc.) and email address?		
3.39	Does the system employ a workflow engine created/modified by functional users so that inquiries, communications, operational actions, approvals and transactions may be routed to the appropriate person(s) or campus office(s) based upon complex business rules?		
3.40	For requests that are automatically routed, how are they monitored and tracked to ensure timely resolution?		
3.41	Explain if it is possible to configure system screens specific to a user's role by department via an edit or drag-and-drop wizard without changing code		
3.42	Can new or added data elements be easily added and used as part of data import/export as well as in campaigns, communications, tracking, filtering and reporting?		
3.43	Is it possible to record unique contact information whether entered through a mass means or individual notes?		
3.44	Is it possible to assign prospects and applicants to specific recruiters?		
3.45	For events, does the system provide web-based/on-line self-service registration forms		
3.46	For events, does the system provide web-based/on-line event(s) calendar(s) or listing(s)		
3.47	For events, does the system provide registration database(s)		
3.48	For events, does the system provide attendance caps/capacity limits		

3.49	For events, does the system provide automated communications (confirmations, reminders, follow ups, satisfaction surveys, etc.)		
3.50	For events, does the system provide calendar appointments		
3.51	For events, does the system provide customizable appointments types		
3.52	For events, does the system provide on-site check-in		
3.53	For events, does the system provide guest lists/waiting lists		
3.54	For events, does the system provide staff calendaring/scheduling		
3.55	For events, does the system provide event summaries/comparisons/reporting		
3.56	For events, does the system provide event planning task/check lists		
3.57	For events, does the system provide the ability to plan and execute recruiting events and activities while tracking invitation and attendance		
3.58	For events, does the system provide event expense tracking		
3.59	For events, does the system provide attendance summaries		
3.60	For events, does the system provide creation of new constituent record, if first point of contact		
3.61	For events, does the system provide integration with existing constituents' records		
3.62	For events, does the system provide a mechanism to handle duplicate submissions		
3.63	For events, does the system provide the ability to search for participants by event, event type, date, participant role, or any field in the event		
3.64	For events, does the system provide a personalized workflow for follow-up campaigns using a simple and intuitive step-by-step workflow chart		
3.65	For events, does the system provide for the use of e-mail, phone, print, and SMS as part of event campaign and follow-up		
3.66	For events, does the system provide the ability to schedule and track customized, rules-based marketing campaigns that track contacts and trigger future communications		
3.67	For events, does the system provide the ability to route the responses to the appropriate event staff based on a pre-set business rule		
3.68	For advising does the system automatically and manually allow you to assign a population of		

	students to a specific advisor based on defined criteria?		
3.69	For advising does the system provide a way to notify an advisor a new student has been assigned to them?		
3.70	For advising does the system provide modeling to score at-risk students?		
3.71	For advising does the system provide a way to track students by a specific timeframe/semester for those who are registered for class(es) and students who are not registered for class(es)?		
3.72	For advising does the system have a way to search for students based on common elements?		
3.73	For advising does the system allow you to search for groupings of students as defined by specific categories?		
3.74	For advising does the system allow you to prebuild specific categories of students that will follow into segments based on set data elements?		
3.75	For advising does the system have built-in analytics to report for specific items such as analyzing course passage rates or can build analytical reports on a data set?		
3.76	For advising does the system have an early alert capability?		
3.77	For advising does the system allow you to build a search to see if a student in a specific major has completed a specific class?		
3.78	For advising does the system have a collaborative space where advising notes can be manually entered and allow for different viewership permissions?		
3.79	For advising does the sync with a calendar such as Outlook to create a scheduling link for a user?		
3.80	For advising does the system allow for customizable questions and or the selection of items from an editable dropdown list that can be asked when an appointment is being made?		
3.81	For advising does the system allow you to create a report on an appointment?		
3.82	For advising does the system show you who made the appointment?		
3.83	For advising does the system provide a record/ report mechanism of how many students had appointments for a given period?		

3.84	For advising does the system allow you to create a kiosk for students to check in to notify them they are here for their appointment?		
3.85	For advising does the system allow you manually to flag a student with a common element and then search on the designated flag?		
3.86	For advising does the system have a dashboard that calculates by major and overall for the institution persistence rates for various terms/semesters/time periods?		
3.87	For advising does the system have a dashboard that calculates by program and overall for the institution graduation rates by set year timeframes such as 2, 4, and 6 years?		
3.88	For travel management, does the system provide the ability to organize and attach/archive invitations (emails and PDFs)		
3.89	For travel management, does the system provide the ability to organize and track staff expenditures		
3.90	For travel management, does the system provide the ability to track required travel materials for event/activity		
3.91	For travel management, does the system provide the ability for input of feedback post-event		
3.92	For travel management, does the system provide the ability to report activities and outcomes via spreadsheets, dashboard, etc.		
3.93	For travel management, does the system provide the ability to integrate with Google Maps and/or MapQuest		
3.94	For travel management, does the system provide the ability to display multiple or recruiter specific events in list and calendar formats		
3.95	For travel management, does the system provide the ability to integrate with Calendars, i.e. Outlook/O365		
3.96	For travel management, does the system provide the ability to the ability to aggregate calendars into service calendars		
3.97	For travel management, does the system provide the ability to send attendance confirmation emails		
3.98	For travel management, does the system provide the ability to analyze expenses to determine Return on Investment		

3.99	For travel management, does the system provide the ability to archive travel management activities' details, expenses and results		
3.991	For travel management, does the system provide the ability to ability to manage territories and connect data points related to geo-regions		
3.992	For travel management, does the system provide the ability to ability to connect data points related to recruits and applicants		
3.993	Detail the manual process for purging and archiving records		
3.994	Detail the automatic process for purging and archiving records		
3.995	Detail the storage capacity limits of the CRM system related to record retention		
3.996	Describe how records are accessed after being archived		
4	**Reporting**		
4.1	For reporting, explain how tools can be developed by functional users.		
4.2	For reporting, explain if all fields, including custom data fields, are automatically available for reporting.		
4.3	For reporting, explain if the environment provides dashboards, visual funnels, etc. that allow easy access to data with minimum training.		
4.4	For reporting, are the following available: basic analytics reflecting the effectiveness and Return on Investment (ROI) of campaigns (i.e. successful delivery, bounce backs, open rates, click thru rates, popular links, etc.) as well as individual communications.		
4.5	For reporting, explain if key metrics can be displayed as a real-time "dashboard".		
4.6	Can built-in reports be customized?		
4.7	Can reports be designed, modified and saved?		
4.8	Is reporting available both on campus and remotely?		
4.9	Does the reporting system offer the ability to save date for trend analysis/historical data?		
4.10	Does the reporting system provide automated report scheduler with output sent to an intranet, database or report via email?		
4.11	Are reports provided to encompass successful and unsuccessful execution of multi-channel communications and outputs?		
4.12	Does the system provide reporting/monitoring of functional users' activities and productivity?		

4.13	Describe how your solution provides a central view of contacts and requests.		
4.14	Describe how your solution provides a secure user interface for prospects, applicants, students and alumni to create and manage their profiles.		
4.15	How are personalized pages or views presented to students to allow announcements, documents, files and notes in multiple formats including video, audio and multiple document files?		
4.16	Describe how can we change the look and feel of the portal/ views to University design standards.		
5	**Implementation and Training**		
5.1	Describe your recommended implementation strategy including on-site coordination and support services, best practices, consulting options and professional services.		
5.2	Provide detailed implementation timelines. (Should reflect all aspects through go-live.)		
5.3	Outline the staffing and composition of the implementation team comprised of University and vendor staff, vendor roles (skillset, responsibilities, past implementation experience, and availability to the University), and proposed hours required for successful CRM implementation		
5.4	Identify any third party vendors involved in your implementation strategy and describe these relationships. Be sure to detail associated licenses, fees, costs, or other implementation requirements and the third party's name, address and contact. Costs should be shown in the Cost Proposal.		
5.5	Describe your recommended strategy for University staffing needs to properly support your product after implementation to ensure product success.		
5.6	Describe your training and customer support models. Include typical training schedules and how it fits into the implementation process.		
5.7	Describe your training program for functional end-users.		
5.8	Describe your training program for technical personnel.		
5.9	If available, describe your Train-the-Trainer program		
5.10	Detail what training would be on-site vs. remote vs. self-help		
5.11	Describe the technical support available for administering your system. What are the hours		

	of availability? What type of support is available (web, email, phone, chat, built in help features, FAQ)?		
5.12	What is the expected response time and method on technical issues?		
5.13	Explain what type of documentation or help system is included in the CRM solution		
5.14	Do you support user groups or advisory boards for the proposed solution? Do they operate independently from your company? Are they national? Are they regional?		
5.15	What services or events do you offer clients to maximize or leverage the features/functionality of the solution?		
5.16	How do you manage and organize on-going contact with your clients?		
5.17	How do you obtain and prioritize feedback for changes or enhancements to your solution? (i.e. user groups, events, customer service, company representatives, etc.)		
5.18	Describe your service level agreement and submit an example.		
5.19	Describe your maintenance agreement and submit an example.		
5.20	Where is your primary support location and what are the hours of service?		
5.21	Do you provide a single point of contact for all questions, support concerns and overall account management?		
6	**Additional Features**		
6.1	Does your solution provide a knowledge base specific to recruitment and admissions?		
6.2	Does your solution provide multiple options for deployment such as website, mobile device, social media channel, customer service center desktop?		
6.3	Does your solution provide a knowledge base or content access can be accessed via permissions based on constituent data attributes?		
6.4	Does your solution provide criteria matching engine within the knowledge base to determine inquiry resolution; operating based on customizable rules recognizing intent of question to deliver the correct answer or suggest the best possible answer		
6.5	Does your system support attachments and links to web locations?		
6.6	Does your system use predictive search functionality with advanced auto complete technology?		

6.7	Does your system have a built-in response ratings feature; Dynamic Top 10 questions feature based on changing timeframes?		
6.8	Does your system provide an answer database & matching engine supported in various languages for full internationalization of solution?		
6.9	Is the user able to rate answers, summarized in reporting?		
6.10	Does your system provide link validation to detect dead or broken links?		
6.11	Does your solution provide a scripted, frequently used email response database?		
6.12	Does your system provide personalized responses with various data fields?		
6.13	Does your system provide branded templates?		
6.14	Does your system provide searchable canned responses?		
6.15	Does your system provide easy and quick accessibility through short cuts or search mechanism for accessing canned responses?		
6.16	Does your system provide searchable emailed responses, i.e. by subject, customer name, text, staff name?		
6.17	Does your system provide action tracking and/or tagging against inbound and outbound email messages? Tracking must include: type of communication, contact name, time/date stamp, actual response, link to original interaction, etc.		
6.18	Does your system provide tracking and monitoring of staff response time for each email?		
6.19	Does your system provide the ability to route based on subject or text in body of email?		
6.20	Detail any additional features your system provides.		

Appendix B: Qualification Statement

<u>QUALIFICATION STATEMENT</u>

I certify that I have read all the instructions and specifications of this bid and this offer is made without prior understanding, or connection with any entity or person submitting a bid for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I am authorized to sign this bid for bidder. I agree to abide by all conditions of this bid request.

Please type or print in black ink.

____
Name of Company

____
Authorized Signature

____
Address

____
Printed/typed Name

____
City State Zip Code

____
Title

____
Telephone

____
Fax

____
Email

____
Federal Tax Number

Minority Information

If this business is minority owned please qualify below: (Example – small, female owned business)

Appendix C: State of Alabama Bid Compliance Form

ATHENS STATE UNIVERSITY – COMPLIANCE WITH SECTION 31-13-9 OF THE *CODE OF ALABAMA*

Section 31-13-9 of the *Code of Alabama*, as amended (see Alabama Act No. 2012-491) (the "Act") is applicable to all contracts entered into with Athens State University via a competitive bidding process.

Be advised that as a condition for the award of any contract that is competitively bid and awarded by Athens State University to a business entity or employer that employs one or more employees, the Act requires that the business entity or employer shall not knowingly employ, hire for employment, or continue to employ an unauthorized alien within the State of Alabama.

Be further advised that as a condition for the award of any contract that is competitively bid and awarded by Athens State University to a business entity or employer that employs one or more employees within the State of Alabama, the Act requires that the business entity or employer shall provide documentation establishing that the business entity or employer is enrolled in the E-Verify program. During the performance of the contract, the business entity or employer shall participate in the E-Verify program and shall verify every employee that is required to be verified according to the applicable federal rules and regulations.

Information about "E-verify" can be found at web address: https://e-verify.uscis.gov/enroll and the program is operated by the United States Citizenship and Immigration Service Bureau of the United States Department of Homeland Security to verify information of employees, pursuant to the Immigration Reform and Control Act of 1986 (IRCA), P.L. 99-603.

Be further advised that the Act requires that any subcontractor, on a project paid for by a contract that is competitively bid and awarded by Athens State University, shall not knowingly employ, hire for employment, or continue to employ an unauthorized alien within the State of Alabama and shall also enroll in the E-Verify program prior to performing any work on the project. During the performance of the contract, the subcontractor shall participate in the E-Verify program and shall verify every employee that is required to be verified according to the applicable federal rules and regulations. A business entity or employer who has been awarded a contract with Athens State University through a competitive bidding process should maintain records of such compliance in case verification is required by Athens State University or a law enforcement agency.

Failure to comply with these requirements may result in breach of contract, termination of the contract or subcontract, termination of employees, and possibly suspension or revocation of business licenses and permits in accordance with the Act, among other things.

All bidders must complete the following information and return this form with their bid information.

1. Are you a business entity or employer that employs one or more employees within the State of Alabama?

□ No

□ Yes, and I have enclosed documentation along with this form establishing that I am enrolled in the E-Verify program. If you answered "Yes," then you must provide such documentation with this form. A copy of your E-Verify Memorandum of Understanding is acceptable documentation.

2. Pursuant to the Act and by operation of law, the following provision shall be incorporated into any contract that is awarded by Athens State University as a result of this competitive bid process, regardless of whether or not the same is expressly set forth in the written documents relating to such contract:

By signing this contract, the contracting parties affirm, for the duration of the agreement, that they will not violate federal immigration law or knowingly employ, hire for employment, or continue to employ an unauthorized alien within the state of Alabama. Furthermore, a contracting party found to be in violation of this provision shall be deemed in breach of the agreement and shall be responsible for all damages resulting therefrom.

I represent and affirm that my response to #1 above is true and correct, that I fully agree and accept the statement in #2 above, and that Athens State University may fully rely on the same. I also acknowledge that I have received notice of and reviewed all of the information contained in this document.

<u>If Bidder is a Business Entity</u>
Name of Bidding Party:___________________

Signature: ______________________________

Printed Name of Signatory: ____________________
Its: ____________________________(Position)
Date: __________________________

<u>If Bidder is an Individual</u>
Name of Individual: ___________________

Signature: ____________________________

Date: ________________________________

Appendix D: Athens State University Vendor Information Form

Complete the form on the next page.

Athens State University Vendor Form

Part I Taxpayer Information

Name (as shown on your income tax return)	Exemptions (if any)	
	Exempt payee code	N/A
Doing Business As (if different from above)	Exemption from FATCA reporting code	N/A

Address	
City, State, ZIP Code	

Check only one appropriate box for federal tax classification

☐ Individual/Sole Proprietor ☐ C Corporation S Corporation Partnership ☐ Trust/Estate

☐ LLC Single Member ☐ LLC C Corporation LLC S Corporation LLC Partnership ☐ Government

☐ Other

Taxpayer Identification Number

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me);
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person; and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions: You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN.

Signature Date ______

Part II Vendor Information

Check appropriate business type (if any)

☐ Woman-Owned ☐ Minority-Owned ☐ Veteran-Owned ☐ Disadvantaged-Owned

Check appropriate Alabama Retirement System Status (if any)

☐ I am currently an active employee in the ERS or TRS ☐ I am currently a retired employee in the ERS or TRS

Contact Person ______ **Email Address** ______

Phone Number ______ **Fax Number** ______

Purchase Order Address ______ **Remittance Address** ______

I have read, certify, and agree to the following:

- Neither I nor a direct family member has a conflict of interest with Athens State University.
- Purchase order must be received prior to purchasing materials or providing service or payment will not be made.
- Purchase order number must be referenced on invoice sent to Athens State University.
- I understand payment terms are Net 30 days (unless otherwise agreed upon or negotiated).
- I have reviewed the Vendor Disclosure Act of 2001-955 requiring disclosure statement for proposals, bids, and contracts in excess of $5,000. I understand all required documents must be submitted before payment can be made.

Signature Date

Appendix E: Cost Form   Bid #32024   Vendor Name________________________

Instructions: Complete the form below with a summary of all anticipated costs. Include any third-party software which is necessary and include explanatory comments as appropriate. Include any costs for providing test, development and production instances. Items not identified in the proposed solution pricing on this form will be considered free add-ons to the existing solution at the price included in this response. In partnering with the right company, Athens State University is prepared to offer a three-year contract, with the option to renew for two (2) one-year terms.

Year 1	**Price**	**Comments**
One-time installation fee	$	
Annual fee (by enrollment? Seats? Other?)	$	
Hosting fee (if priced separately)	$	
Support fee (if priced separately)	$	
Training fee (if priced separately)	$	
Migration fee	$	
Other Costs (include comments)	$	
Customization Costs (include comments)	$	
Total	$	

Year 2

Annual fee (by enrollment? Seats? Other?)	$	
Hosting fee (if priced separately)	$	
Support fee (if priced separately)	$	
Other Costs (include comments)	$	
Total	$	

Year 3

Annual fee (by enrollment? Seats? Other?)	$	
Hosting fee (if priced separately)	$	
Support fee (if priced separately)	$	
Other Costs (include comments)	$	
Total	$	

Year 4 (OPTIONAL)

Annual fee (by enrollment? Seats? Other?)	$	
Hosting fee (if priced separately)	$	
Support fee (if priced separately)	$	
Other Costs (include comments)	$	
Total	$	

Year 5 (OPTIONAL)

Annual fee (by enrollment? Seats? Other?)	$	
Hosting fee (if priced separately)	$	
Support fee (if priced separately)	$	
Other Costs (include comments)	$	
Total	$	

ATHENS STATE UNIVERSITY

GENERAL CONDITIONS FOR PURCHASING SOLICITATIONS

Bidder: To ensure responsiveness and acceptance of bid, please follow these instructions. (The use of the words: bid/bidder, proposal/proposer, vendor, contractor, and supplier for the context of this solicitation all have the same meaning for the company/firm submitting a bid or a request for proposal.)

1. Bid Opening: Sealed bids or proposals must be received in the Office of Financial Affairs by the bid opening time and date specified in this invitation to bid unless changed by addendum. Sealed bids or proposals shall be mailed to Athens State University, Office of Financial Affairs, 300 N. Beaty Street, Athens, AL 35611 and must be marked with the bid/proposal number and opening date/time. All courier delivered bids/proposals MUST have the bid/proposal number and opening date/time on the outside of the courier packet. All bids delivered after the specified time will not be considered. At the bid opening, no discussion will be entered into with any vendor as to the quality or provisions of the specifications, and no award will be made either stated or implied.

2. Preparation of Bid: Bid shall contain a manual signature of an authorized representative in the space provided. Responses must be printed in ink or typewritten. No erasures permitted. Errors may be crossed out and correction printed in ink or typewritten adjacent, and must be initialed in ink by person authorized to sign the bid.

3. Submittal of Bid: ***The bid submission form included in the request should be completed and returned as requested.*** Modifications and corrections received after the closing time specified will not be considered. It is the bidder's responsibility to examine any drawings, specifications, and instructions.

4. Prices and Delivery: Firm prices shall be quoted, typed, or printed in ink, to include all packing, handling, shipping, and delivery charges FOB Athens State University. Unless otherwise specified, bid prices are assumed firm for a minimum period of 120 days after the date of the opening. Athens State University is exempt from Federal Excise and State Taxes. Code of Alabama 40-23-4.

5. Installation: Where installation is required, the successful bidder shall be responsible for placing and installing the product in the required location(s). Authorized product and price list shall clearly and separately identify any additional installation charges. All materials used in the installation shall be of good quality and shall be free of defects that would diminish the appearance of the product or render it structurally or operationally unsound. Installation includes the furnishing of any equipment, rigging, and materials required to install or replace the product in the proper location. The successful bidder shall protect the site from damage and shall repair damages or injury caused during installation by the vendor, its employees or agents. If any alteration, dismantling, excavation, etc., is required to achieve installation, the vendor shall promptly restore the structure or site to its original condition. The successful bidder shall perform installation work so as to cause the least inconvenience and interference with the University and with proper consideration of others on site. Upon completion of the installation, the location and surrounding area of work shall be left clean and in a neat and unobstructed condition, with everything in satisfactory repair and order.

6. Acceptance and Rejection: Inspection and testing, if any, and acceptance will be at the destination unless otherwise provided, but all materials and workmanship shall be subject to inspection and test at all times and places, and where practicable. Title to risk or loss or damage to all items shall be the responsibility of the supplier until acceptance by the University unless loss or damage results from negligence by the University. During manufacture, the right is reserved to reject articles that contain defective material and workmanship. Rejected material shall be removed by and at the expense of the bidder promptly after notification of rejection. Final inspection and acceptance or rejection of material or supplies shall be made as promptly as practicable, but failure to inspect and accept or reject materials or supplies shall not impose liability on the University thereof for such materials or supplies as not in accordance with the specifications. In the event necessity requires the use of materials or supplies not conforming to the specification, payment may be made with a proper reduction in price.

7. Brand Name Reference: Unless specified "no substitute," any catalog brand name or manufacturer's reference used in the ITB is descriptive only, not restrictive, and used to indicate the type and quality desired. If bidding on other than referenced specifications, the bid must show the manufacturer, brand or trade name, and other descriptions, and should include the manufacturer's illustrations and complete description of the product offered. The University reserves the right to determine whether a substitute offered is equivalent to and meets the standards of the item specified, and the University may require the bidder to supply additional descriptive material, samples, or demonstrations. The bidder guaranties that the product offered will meet or exceed the referenced product and or specifications identified in the ITB. If the bidder takes no exception to the specifications, bidder will be required to furnish the product exactly as specified in the solicitation.

8. Samples: Samples or demonstrations, when requested, must be furnished free of expense to the University. Samples not destroyed during reasonable examination will become the property of the University unless bidder states otherwise. Each sample should be marked with the bidder's name address, bid number and item number.

9. Interpretation: Any questions concerning specifications and conditions shall be directed to Mike McCoy, VP for Financial Affairs, mike.mccoy@athens.edu, 256-216-3303, unless otherwise specified.

10. Disputes: In case of any doubt or differences of opinion as to the items to be furnished under a contract resulting from this bid, the decision of the VP for Financial Affairs shall be final and binding on both parties.

11. Time of Performance: The number of calendar days in which delivery will be made after receipt of order shall be stated in the bid, if applicable.

12. Acceptance of Bid/Award: The University reserves the right to accept or reject all or any part of a bid or any and all bids, to waive any informality, general condition, special condition, or minor specification deviation when considered to be in its best interest, and to award the bid that best serves the interest of the University. The University may elect to award a bid on "all or none" basis. Athens State University reserves the right to purchase according to the availability of funds. The award will be made to lowest responsive and responsible bidder meeting specifications. Documents contained herein are considered part of the binding contract. It is understood and agreed that the University shall have 120 days for bid acceptance.

13. Default: Backorders default in promised delivery or failure to meet specifications, authorize the University to cancel this contract to the defaulting bidder. The bidder must give written notice to the University of the reason and the expected delivery date.

14. Addenda: An addendum may be issued as an addition or supplement or clarification to the bid document. Only written addenda are part of the bid packet and should be considered.

15. Alternate Bids: Unless specifically requested, alternate bids will not be considered.

16. Insurance and Indemnification: The bidder agrees to indemnify and hold harmless the University, its officers, agents, and employees from and against any and all claims and liabilities (including expenses) for injury or death of persons or damage to any property which may result, in whole or in part, from any act or omission on the part of the bidder, its agents, employees, or representatives, or arise from any bidder furnished goods or services, except to the extent that such damage is due solely and directly to the negligence of the University. The bidder will carry comprehensive general liability insurance, including contractual and product liability coverage, with minimum limits acceptable to the University. The bidder will, at the request of the University, supply certificates evidencing such coverage.

17. Risk of Loss: The bidder assumes the following risks: (1) all risks of loss or damage to all goods, work in process, material, and equipment until the delivery thereof as herein provided; (2) all risks of loss or damage to third persons and their property until delivery of all goods as herein provided; (3) all risks of loss or damage to any property received by the bidder or held by the bidder or its suppliers for the account of the University, until such property has been delivered to the University; (4) all risks of loss or damage to any of the goods or part thereof rejected by the University, from the time of shipment thereof to bidder until redelivery thereof to the University.

18. Non-Discrimination: The University provides equal opportunity for all businesses and does not discriminate against any vendor regardless of race, color, creed, sex, national origin, or disability in consideration for an award.

19. Assignment: Assignment of any rights or obligations under award or any portion of this bid is not allowed without the express written consent of the University.

20. Tobacco and Drug Policy: Athens State University is a tobacco and drug free campus. All vendors, employees, and agents shall abide by the tobacco and drug free policy while on any property owned/leased by the University.

21. Warranty: The bidder expressly warrants that all articles, material, and work offered shall conform to each and every specification, drawing, sample, or other description which is furnished to or adopted by the University, and that it will be fit and sufficient for the purpose intended, merchantable, of good material and workmanship, and free from defect. The bidder further warrants all items for a period of one year, unless otherwise stated, from the date of acceptance of the items delivered and installed or work completed. All repairs, replacements, or adjustments during the warranty period shall be at the bidder's sole expense.

22. Hazardous and Toxic Substances: Bidder must comply with all applicable federal, state, county, and city laws ordinances and regulations relating to hazardous and toxic substances, including such laws, ordinances, and regulations pertaining to information about hazardous and toxic substances, and as amended from time to time. Bidder shall provide the University with a "Material Safety Data Sheet" if required.

23. Patents: Bidder guarantees that the sale and/or use of goods will not infringe upon any U.S. or foreign patent. Bidder will at his/her own expense, indemnify, protect, and save harmless, the University and its employees on any claims arising out of the purchase of goods or services.

24. Domestic Products: In public works projects, the contractor agrees to use in the execution of the contract materials, supplies, and products manufactured, mined, processed, or otherwise produced in the United States or its territories, if the same are available at reasonable and competitive prices and are not contrary to any sole source specification.

25. Required Submissions: Before a purchase order will be issued, the awarded vendor will be required to submit to the University the following documents (if applicable) completed and properly executed:

* <u>State of Alabama Vendor Disclosure</u> – for purchases $5,000 and greater
* <u>Athens State University Vendor Form W-9 - enclosed</u>
* <u>Alabama Immigration Law Certificate of Compliance</u>
* <u>E-Verify Memorandum of Understanding – submit with the enclosed bid compliance form</u>

26. Certification Pursuant to Act No. 2006-557: Alabama law (Section 41-4-116, Code of Alabama 1975) provides that every bid submitted and contract executed shall contain a certification that the vendor, contractor, and all of its affiliates that make sales for delivery into Alabama or leases for use in Alabama are registered, collecting, and remitting Alabama state and local sales, use, and/or lease tax on all taxable sales and leases into Alabama. By submitting a bid, the bidder is hereby certifying that the bidder is in full compliance with Act 2006-557, not barred from bidding or entering into a contract pursuant to 41-4-116, and acknowledges the awarding authority may declare the contract void if the certification is false.

Any and all general information, special terms and conditions, or scope of work, etc., attached hereto which vary from these general conditions shall have precedence