

OFFICE OF PROCUREMENT
REQUEST FOR PROPOSAL TITLE: CLOUD-BASED ADVANCEMENT CUSTOMER RELATIONSHIP MANAGEMENT
SOFTWARE SOLUTION/SYSTEM
RFP NUMBER: E521-021
RFP CLOSING DATE: JANUARY 4, 2021



ADDENDUM #1

Issued: December 16, 2020

ADDENDUM FOR THE PURPOSE OF:

- To extend the Closing Date from **December 22, 2020 at 3:00 p.m.**, to **January 4, 2021 at 3:00 p.m.**
- To provide the attached questions and answers
- To delete Section 4: Proposal Evaluation and Award, and replace it with attached, **Revised Proposal Evaluation and Award**, which includes a product demonstration.

All other specifications, terms and conditions remain unchanged.

A handwritten signature in black ink, appearing to read 'Patrick Johnson', written over a horizontal line.

Patrick Johnson, MBA
Director of Procurement

Please **sign** below to acknowledge receipt of this Addendum and return with the proposal. Failure to return this Acknowledgement of Addendum may deem a proposal nonresponsive.

NOTE: All proposals MUST BE RECEIVED **electronically** (NEW) by 3:00pm Eastern Standard Time on **January 4, 2021.**

Electronic proposal and addendum or addenda shall be sent to the following email address prior to the submittal deadline date and time at vendor.proposals@montgomerycollege.edu. **No responses will be accepted after this date and time.**

Company Name

Authorized Signature

Date

Printed/Typed Signature

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Vendor Questions	MC Response
1. Per Section 2.1: You have 50,000 students. Would this be the number of contacts you expect to start with (e.g. people you will send or receive messages to or from)? And how much growth do you expect over time?	This solution is intended for marketing to prospective students, which includes high school graduates, transfer students, alumni, and certain adult workforce students. We estimate about 10,000 active contacts will be in the database and expect only modest growth year to year.
2. Per Section 2.1: You indicate there are 3,100 staff. How many of those staff would be "users" of the CRM (e.g. people who would login to the system to create or send emails, run reports, update a contact's record for them)? Would you expect this to increase or decrease over time, and if so, by how much?	The users of the system would be limited to marketing, student recruitment, alumni, and advancement staff. We expect a total of about 20 people would need access.
3. Section 3, Page 16: What is the estimated number of SMS messages you expect to send per month? Do you intend to use MMS messaging, and if so, how many per month?	We expect that SMS messages would be sent only as needed to specific contacts based on behavior or certain conditions. We do not intend to send frequent text messages to all contacts. We have no plans to send MMS messages at this time.
4. Section 3, Page 17 indicates, "Must allow for 500,000 individual records with option to scale for additional records." What does this refer to? The number of records of interactions with your contacts?	This is simply an extreme possible number of contacts that could be accumulated over time.
5. Section 3, Page 18: Do you currently use voice services? Can you provide an estimate (number of minutes per month) of incoming and/or outgoing voice messaging?	Current plans do not include automated voice messaging. The College uses live voice calls to certain students during limited campaigns. Incoming voice messages would not be handled by the CRM solution.
6. Per Section 1.12, Do we attach a complete copy of the RFP as it was presented to us (along with any Addendum) to our proposal? In other words, are we to understand that referencing the RFP itself is not sufficient, so a blank copy of it would be included with our response?	Yes, the RFP Packet should be returned in its entirety. Failure to provide any of the items noted in Section(s) 1.12, & 5.2.2 may deem a proposal non-responsive.
7. We plan to send the hard copy of the proposal after we submit the electronic copy. Is there any concern about trying to get deliveries around the holidays? For example, are there any days the Office of Procurement will be closed to package delivery?	The College will be closed December 24, 2020 through January 3, 2021.
8. Regarding the hard copy of the proposal listed in Section 5: Do we need to separate the Price Proposal from the Technical Proposal, or should it all be included together?	Yes, one attachment shall include the Technical Proposal , and the second attachment shall include the Price Proposal .
9. How many users will need access to the platform? <ul style="list-style-type: none"> ▪ Can you outline the roles and access of these users? 	We expect 10 to 20 users will access the system.

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<ul style="list-style-type: none"> ▪ Will all users need the ability to create & send marketing campaigns? 	<ul style="list-style-type: none"> ▪ Marketing director, campaign strategist, social media manager, recruiters. ▪ No.
<p>10. You mention the solution must “have capability to expand functionality to improve admissions application process, provide a single student self-service application and requirement tracking, and facilitate enrollment process (enrollment checklist).”</p> <ul style="list-style-type: none"> ▪ To confirm, this is part of a potential future phase/expansion of the project? It should not be priced and scoped in this response? 	<ul style="list-style-type: none"> ▪ Correct on both questions.
<p>11. Solution must support use by multiple College offices with separate ownership/update rights to email lists, templates, and campaign materials, as well as global system administration.</p> <ul style="list-style-type: none"> ▪ Is separate ownership needed due to data privacy silos that need to be in place between departments? ▪ How many “College units” will be included in the project? ▪ Will contacts need to live in/exist across multiple departments/Colleges? (I.e. Will the same email/contact need to be stored across multiple Colleges?) ▪ What functionality is needed at the ‘global system admin’ level? 	<ul style="list-style-type: none"> ▪ No. ▪ Initially, two units. ▪ All contact records should be available to all users at the college. ▪ All system administration functions as would normally be granted in other software solutions.
<p>12. Why has the MCC decided to make this investment and issue this RFP now?</p>	<p>MC is working to improve its student marketing and recruiting.</p>
<p>13. What are the goals of this engagement?</p>	<p>To select a CRM system for a year trial that we hope will inform us about a long-term solution.</p>
<p>14. What challenges is this engagement looking to solve?</p>	<p>Marketing automation that is customized for individual student prospects.</p>
<p>15. Please describe your decision making process for this RFP.</p>	<p>See new Revised Section 4: Proposal Evaluation and Award for specifics.</p>
<p>16. Is there a budget for this engagement that you can share?</p>	<p>This information is not available at this time.</p>
<p>17. Please share more about your timeline for selection, implementation, go-live,etc.</p>	<p>Selection and implementation are expected in early 2021.</p>
<p>18. Please confirm that a hard copy of our RFP response must be sent to the office. Please indicate your decision/award date so that we can ensure the hard copy arrives in advance.</p>	<p>In addition to the electronic submission, one original hard copy proposal is also required. Hard copy proposal shall be mailed/delivered to the address listed below and must be received prior to contract award. Vendor proposal will not be rejected, if hardcopy is not</p>

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	received by the proposal submittal deadline; however, it must be received prior to contract award or sooner.
19. What capacity and infrastructure is in place for ongoing maintenance and management?	The college's marketing/communications and information technology teams are the primary managers of the solution.
20. Describe your rollout and launch process. Do you intend to roll this solution out to a small pilot group of organizations/programs?	The launch program depends on the chosen solution and vendor support.
21. What system(s) are you currently using for CRM and marketing?	The College has no current CRM or marketing automation systems.
22. What system(s) will be retired as a result of this project?	None.
23. Does the MCC currently use Salesforce? If so, please describe.	No.
24. How many users will be using the CRM?	See answers to question #9.
25. Please describe the business roles of the users. How will they use the solution, i.e. CRM? Marketing?	See answers to questions #9
26. How many different business units (i.e. colleges, teams, departments, etc.) will be using the solution? How many need to be set-up as a part of this engagement?	The communications and recruiting departments are primary users.
27. How many emails do you send in a given month?	Unknown.
28. How many email templates, forms and/or landing pages must be configured?	Initially, fewer than 10 email templates will be employed. Landing pages will be created in the college's Omni Update CMS.
29. Please describe any automation you require.	Please refer to the RFP.
30. Is set up of the integration with Ellucian and/or Workday in scope for this project?	Yes. Downloads of contact/student records from Ellucian Banner platform are required, as per the RFP.
31. Is data migration in scope? If yes, what volume of records must be migrated? What is the quality and cleanliness of the data?	Downloads of contact/student records from Ellucian Banner platform are required, as per the RFP. The database is very high quality.

***** **End of Questions & Answers** *****

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SECTION 4 – REVISED PROPOSAL EVALUATION AND AWARD

4.1 Proposal Evaluation

4.1.1 Evaluation Process

All proposals submitted will first be examined for responsiveness and completeness by the College evaluation team. Those proposals which do not clearly respond to the proposal submission requirements may be rejected at the discretion of the College. Those proposals not rejected will be evaluated to determine which offer best meets the requirements in the RFP and is in the best interest of the College. Proposal information will be evaluated and scored by the College, and its decision will be final.

Technical Proposals will be opened first at the date and time advised in the RFP documents, and evaluated by a College Evaluation Committee. The Price Proposals remain sealed and are held by the Procurement Office. Evaluation of Technical Proposals will be based on the criteria provided in the RFP, the substantiated ability of an Offeror to perform the required services, and the Offerors responsiveness to the RFP requirements.

4.1.2 Evaluation Criteria

Technical Proposals will be initially evaluated and scored by the College Evaluation Committee based on the following criteria:

<u>Description of Criteria</u>	<u>Maximum Point Value</u>
4.1.2.1 Functional Requirements	35 (maximum available points)
4.1.2.2 Experience and Qualifications	10 (maximum available points)
4.1.2.3 Project Approach/Implementation	25 (maximum available points)
4.1.2.4 Demonstration	15 (maximum available points)
4.1.2.5 Price Proposal	15 (maximum available points)

Highest possible evaluation score **100**

4.1.3 Technical Proposal

Functionality, Statement of Qualifications, Past Performance, and Project Approach/Timeline represent the technical proposal. Award will be made in aggregate, to the highest evaluated, most responsive, responsible Offeror meeting all RFP terms, conditions, and specifications.

4.1.4 Presentation/Demonstration

Following the initial scoring by the evaluation committee respondents receiving the top three (3) highest technical scores will be invited to give a presentation of their proposed solutions and capabilities as part of the evaluation process.