



RFP - AGENCY SOLICITATION SPECIFICATIONS

TITLE: RFP 24004250 CCRI - CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

SECTION A. BACKGROUND

The Community College of Rhode Island is the largest community college in New England, providing high-quality academic programs and career-oriented training for full- and part-time students, recent high school graduates, and adult learners.

Named the 2019 Two-Year College of the Year by Education Dive magazine, CCRI enrolls more than 13,000 students in credit-bearing degree and certificate programs and an additional 8,500 individuals in Workforce Development programs and adult education courses annually.

With campuses in Warwick, Providence, Newport, and Lincoln and satellite campuses in Westerly and Woonsocket, CCRI meets Rhode Islanders where they are, offering an outstanding college education that leads to strong learning outcomes, successful degree attainment, and job placement opportunities. Students can choose from more than 90 majors and programs and seven academic career paths. CCRI also offers online, hybrid, and in-person options in addition to seamless transfer opportunities for students looking to continue their education at a four-year college or university.

The Community College offers extensive community programming as well, opening its facilities for public use, sponsoring programs on issues of public concern, and offering workshops and seminars for businesses, government agencies, and individuals seeking to improve their skills or enhance their lives.

The purpose of this RFP is to identify a qualified vendor that will exemplify our institution's mission by providing comprehensive Customer Relationship Management (CRM) software with the highest caliber of services delivered to the Community College of Rhode Island community.

SECTION B: SCOPE OF WORK AND REQUIREMENTS

The enrollment landscape requires CCRI to modernize our infrastructure, align with student consumer preferences that define and communicate our value, and reduce administrative barriers to applying and matriculation. At the heart of this CRM strategy, to generate demand and convert student prospects must be equity and promote anti-racism at every stage of the student recruitment experience. To execute those aims effectively, CCRI must transform the recruitment experience for direct from high school learners (40% of the student body) and working adults (60% of the student body) through greater personalization and better process efficiency at high-impact touchpoints that will enable frictionless student recruitment and enrollment. CCRI seeks a CRM solution that supports the need for agile, data/analytics-informed decision-making as CCRI is pressured to boost enrollment from smaller applicant pools and growing consumer skepticism about higher education. Some specific areas include the following. Online application: Create

secure and mobile first admission application. Application review: Annotate and delegate applications to review. Custom emails: Branded with custom layouts, calls-to-action, and drop-in images. Configure email and texting campaigns with audience segmentation based on any field/data point in Banner. Text messaging: Send personalized text messaging 1:1 and bulk. Online chat: Connect with prospects on website. Tele-recruiting: Launch and track personalized call campaigns. Events management: Seamless registration for on-campus and online welcome days, orientation, and other related events. Student portal: View missing requirements, submit documents, and review decisions. Workflow automation: Assign prospects to counselors based on territory (or similar) and build workflows based on specific criteria to send the right email at the right time. Form builder: Create web forms for inquiries and events. Data importing: Import data from search lists and test scores etc. Real-time Reporting. Additionally the CRM must be available for use by all student-related departments including Financial Aid, Bursar, Registrar, etc., as well as other departments for internal and external communications, including Institutional Advancement and Human Resources. Product must be delivered as Software as a Service and include complete two-way integration to CCRI's required databases and applications.

SECTION C: PROPOSAL

1. Technical Proposal

Narrative and format: Vendors must submit a technical proposal which addresses each of the following elements and is limited to 20 pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request):

- A. **Staff Qualifications** – Provide staff resumes/CV and describe qualifications and experience of key staff who will be involved in this project, including their experience in Implementation project management; CRM setup and configuration; end user training; and product support .
- B. **Capability, Capacity, and Qualifications of the Vendor** – Provide a detailed description regarding experience as a software developer, specifically in the area of CRM. List a minimum of three (3) relevant client references, to include client names, addresses, contact names with emails and phone numbers, dates of service, and type(s) of service(s) provided.
- C. **Work Plan** – Please describe in detail, the framework within which requested CRM implementation and operational services will be performed. The following elements should be included:
Comprehensive communications capabilities, including complex and automated communication plans; multiple delivery methods including at least E-Mail, SMS, Push Notifications, and paper mail generation; a comprehensive recruiting and application module; a comprehensive event management module; the ability to perform surveys, store and analysis results; a complete advancement module to process pledges, gifts, and matching gifts.
- D. **Approach/Methodology** – Define the methodology to be used to handle the delivery of e-mail to ensure that deliveries do not arrive in end user's junk mail; how selected e-mail communications will appear in the sender's "Sent Mail" folder; how the delivery method can be changed and the content re-delivered based on factors such as invalid mailbox,

invalid phone number, message not opened within x-days, message opened, a message's embedded link was clicked, etc.

E. Please complete ATTACHMENT A – FUNCTIONALITY AND RESPONSE QUESTIONNAIRE

2. Cost Proposal

Provide a cost proposal for the required services which includes the following information: Any and all hardware costs if applicable; software licensing costs for unlimited number of user; annual maintenance and support costs including anticipated increases throughout the life of the contract; implementation costs; project management costs; two-way complex integration to Ellucian's Banner S/W; an hourly rate for any required customizations; any costs associated with E-mail or Texting; an optional cost associated with paper mailing (if you provide such services). Include any annual price increases for at least the first five (5) years of the contract. Please use the Cost Sheet to fill in the values, then explain all other fees or costs on a separate document and attach to the Cost Sheet.

3. ISBE Proposal

See Appendix A on the "Overview" tab in Ocean State Procures™ for information and the MBE, WBE and/or Disability Business Enterprise Participation Plan form(s). Vendors are required to complete, sign and submit these forms with their overall proposal. Please complete separate forms for each MBE, WBE, and/or Disability Business Enterprise subcontractor to be utilized on the solicitation.

SECTION D: EVALUATION AND SELECTION - SOLICITATION SPECIFIC

Technical proposals must receive a minimum of 60 (85.7%) out of a maximum of 70 points to advance to the cost evaluation phase. Technical proposals scoring less than 60 points shall not have the accompanying cost or ISBE participation proposals opened or evaluated; such proposals shall not receive further consideration.

Technical proposals scoring 60 points or higher shall have the cost proposals evaluated and assigned up to a maximum of 30 points bringing the total potential evaluation score to 100 points. As total possible evaluation points are determined, vendor ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

Proposals shall be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Staff Qualifications	2.8 Points
Capability, Capacity, and Qualifications of the Vendor	2.8 Points
Work Plan	5.6 Points
Approach/Methodology	2.8 Points

Attachment A Responses	56 Points
Total Possible Technical Points	70 Points
Cost proposal	30 Points
Total Possible Evaluation Points	100 Points
ISBE Participation	5 Bonus Points
Total Possible Points	105 Points

See the “Requirements” tab of this solicitation for additional information on the evaluation and selection process in the “RFP Standard Specification” section.