



Contra Costa Community College District

4CD- 95

Customer Relationship Management

REQUEST FOR PROPOSAL

Release Date: September 2, 2022

Questions Due by: 2 PM (PT), September 12, 2022

Proposals Due by: 2 PM (PT), September 29, 2022

SECTION I: INSTRUCTIONS AND GENERAL PROVISIONS

The Contra Costa Community College District (District) invites highly experienced firms to submit proposals to provide a Districtwide Customer Relationship Management Tool, a software tool that can help the District with its Prospecting, Communications, Recruitment, Onboarding, and Student Lifecycle Visibility.

The District consists of 3 colleges and 2 centers: Diablo Valley College in Pleasant Hill, Contra Costa College in San Pablo, Los Medanos College in Pittsburg, Brentwood Center and San Ramon Center. The District serves approximately 51,000 students annually.

PROPOSAL SUBMISSION

- A. Sealed offers to be submitted to:

John Cook, Purchasing Dept.
Contra Costa Community College District
500 Court Street
Martinez, CA 94553

- B Date/Time: Proposals shall be received **before 2 PM (PT), September 29, 2022.**

- C The face of the sealed envelope or box shall be clearly marked **“4CD-95 RFP”**.

- D A faxed proposal will not be accepted. Only mailed or hand- delivered, signed offers will be considered. The proposal must be in the possession of the District’s Purchasing Department before 2:00 p.m. PT on the closing date. Late proposals will not be accepted and will be returned to the Contractor. The District will not be responsible for late delivery by U.S. mail or any other means. Proposals will NOT be opened at that time.

- E Contractors must submit **one (1) original hardcopy and one (1) electronic copy via flash drive.** Each proposal received in response to this RFP shall remain the property of the District.

QUESTIONS

- A. **Questions are due before 2 PM (PT), September 29, 2022.** All questions regarding proposal preparation, the selection process, specifications and interpretations of the terms and conditions of the Request for Proposal (RFP) shall be submitted in writing by email (preferred) to **John Cook, Purchasing Department, jcook@4cd.edu** or fax to **(925) 370-6517**.

SCHEDULE The District reserves the right to modify the below schedule of events.

Request for Proposal release date: **September 2, 2022**

Questions Due by: **2 PM (PT), September 12, 2022**

Response to all questions: **September 14, 2022**

Proposals Due by: **2 PM (PT), September 29, 2022**

Committee RFP Evaluation: **October 3 to October 10, 2022**

Notify Shortlisted Firms: **October 11, 2022**

Questions about Demonstration Scripts Due: **October 18, 2022**

District Responds to Demonstration Scripts questions: **October 20, 2022**

Demonstration/Presentation: **October 31 to November 4, 2022**

RFP Award: **November 16, 2022**

Board Meeting: **December 14, 2022**

Contract Award: **December 15, 2022**

PROPOSAL FORMAT. Distinct divider pages should separate and identify the responses and be titled or numbered as indicated. Any additional materials, submitted at the discretion of the submitting firm, such as marketing collateral, must be provided separately from the main submittal, and marked clearly.

ACCEPTANCE PERIOD. Proposals are firm for a period of ninety (90) days.

ADDENDA/AMENDMENTS ACKNOWLEDGMENT. The District, at its sole discretion, may issue amendments / addenda to this RFP at any time prior to the time set for receipt of proposals. Interested parties should frequently check the District's website for such addenda at <https://webapps.4cd.edu/apps/purchasingviewbids/default.aspx>

Each contractor shall acknowledge receipt of the addendum by marking and dating the addendum/addenda acknowledgment area on the signature page. Failure to so acknowledge may result in the proposal being rejected as not responsive. The District shall not be bound by any representations, whether oral or written, made at a pre-proposal, pre-contract or site meeting, unless such representations are incorporated in writing as an amendment to the RFP or as part of the final contract.

AUTHORIZED SIGNATURES. Every proposal must be signed by the person or persons legally authorized to bind the Contractor to a contract for the execution of this contract. Upon request of the District, any agent submitting a proposal on behalf of a Contractor shall provide a current power of attorney certifying the agent's authority to bind the Contractor. If an individual makes a proposal, his or her name, signature and post office street address must be shown. If a firm or partnership makes the proposal, the name and post office address of the firm or partnership and the signature of at least one of the general partners must be shown. If a corporation makes the proposal, the proposal shall show the name of the state under the

laws of which the corporation is chartered, the name and post office address of the corporation and the title of the person signing on behalf of the corporation. Upon request of the District, the corporation shall provide a certified copy of the bylaws or resolution of the board of directors showing the authority of the officer signing the proposal to execute contracts on behalf of the corporation.

PUBLIC INFORMATION. Following the award of a contract, responses to this solicitation may be subject to release as public information unless the response or specific parts of the response can be shown to be exempt from public information. Contractors are advised to consult with their legal counsel regarding disclosure issues and take appropriate precautions to safeguard trade secrets and confidential commercial, financial, geological, and geophysical data. The District assumes no obligation or responsibility for asserting legal arguments on behalf of Contractors.

CONFIDENTIALITY. If a Contractor believes that portions of a proposal constitute trade secrets or confidential commercial, financial, geological, or geophysical data, then the Contractor must so specify by, at a minimum, stamping in bold red letters, the term "CONFIDENTIAL" on that part of the proposal which the Contractor believes to be protected from disclosure. The Contractor must submit in writing specific detailed reasons, including any relevant legal authority, stating why the Contractor believes the material to be confidential or a trade secret. Vague and general claims as to confidentiality will not be accepted. The District will be the sole judge as to whether a claim is general and/or vague in nature. All offers and parts of offers that are not marked as confidential may be automatically considered public information after the contract is awarded. The Contractor is hereby notified that the District may consider all parts of the offer public information under applicable law even though marked confidential.

AWARD OF CONTRACT. Award of a contract will be made to the Contractor offering the most advantageous proposal after consideration of all Evaluation Criteria set forth below; however, the District will not be limited solely to the evaluation factors in making its final decision. The criteria are not listed in any order of preference. An Evaluation Committee will be established by the District. The District shall not be obligated to accept the highest commission, or any commission offered, and will make an award in the best interests of the District after all factors have been evaluated.

CONTRACT TERMS. The District's intent is to enter into a contract for a period of three (3) years, subject to satisfactory performance, with potential one-year extensions for two (2) additional years, at the option of the District. Each party may terminate the contract with thirty (30) days written notice.

CANCELLATION OF SOLICITATION. The District may cancel this solicitation at any time.

FORMATION OF CONTRACT. The Contractors' signed proposal and Contra Costa Community College District's Request for Proposal shall be incorporated into a contract with our without negotiation.

INFORMED CONTRACTOR. The Contractor is expected to fully inform themselves as to the conditions, requirements, and specifications before submitting proposals. Failure to do so will be at Contractor's own risk and they cannot secure relief on the plea of error.

INK OR TYPEWRITTEN. All information, prices, notations, signatures, and corrections must be in ink or typewritten. Mistakes may be lined through and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the proposal.

NON-COLLUSION AFFIDAVIT. Contractors are required to submit a Non-Collusion Affidavit with their Proposals. **See Exhibit A.**

COST OF PREPARATION. The District is not liable for any costs incurred by Contractors before entering into a formal contract.

REJECTION OF PROPOSALS. The District reserves the right to reject any or all Proposals or any part of a Proposal and also to waive informalities, minor irregularities, or other requirements in our Request for Proposal and /or offers received, and/or to accept any portion of the offer if deemed in the best interest of the District. Failure of the Contractor to provide in its proposal any information requested in this RFP, including the signed Contractor's Pricing Page, Non Collusion Statement, etc., may result in rejection for non-responsiveness.

ASSIGNMENT OF RIGHTS OR OBLIGATIONS. Except as noted hereunder, Successful Contractor may not assign, transfer or sell any rights or obligations resulting from this solicitation without first obtaining the specific written consent of the District.

ATTORNEY FEES. In the event a suit or action is instituted in connection with any controversy arising out of this contract, the prevailing party shall be entitled to receive, in addition to its costs, such sum as t

CONTRACT INCORPORATION. The contract embodies the entire contract between the District and the Contractor. The parties shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind or nature not set forth herein or referenced herein. No changes, amendments, or modifications of any of the terms or conditions of the contract shall be valid unless reduced to writing and signed by both parties. The complete contract shall include the entire contents of this RFP Solicitation, all addenda, all of Contractor's successful submittal; supplemental agreements and any and all written agreements which alter, amend or extend the contract.

FORMATION OF CONTRACT. Contractor's signed Proposal and District's written acceptance or purchase order shall constitute a binding contract.

LAWS GOVERNING CONTRACT. This contract shall be in accordance with the laws of the State of California. The parties stipulate that this contract was entered into in the County of Contra Costa, in the State of California. The parties further stipulate that the County of Contra Costa, State of California is the only appropriate forum for any litigation resulting from a breach hereof or any questions risen here from.

COMPLIANCE WITH LAWS. All Proposals shall comply with current federal, state, local and other laws relative thereto.

COMPLIANCE WITH ALL LAWS. The Contractor warrants that it will comply with all federal, state and local laws, ordinances, rules and regulations applicable to its performance under this contract including, but not limited to, the Fair Labor Standards Act of 1938, as amended, the Williams – Steiger Occupational Safety and Health Act of 1970 and as amended; the State of California sales and use tax regulations; non-discriminatory employment practices under the Federal Equal Employment opportunity Clause prescribed by Executive order 112465 dated September 24, 1965 as amended. The District does not permit any person or entity using its facilities for commercial purposes to engage in unlawful discrimination.

SEVERABILITY. If any provisions or portion of any provision, of this contract are held invalid, illegal or unenforceable, they shall be severed from the contract and the remaining provisions shall be valid and enforceable.

SECTION II: PROPOSAL REQUIREMENTS

To be considered for selection, respondents shall meet/provide the following requirements:

1. MINIMUM REQUIREMENTS

- 1.1. Must be licensed by the State the business is in, if services requested require such licensure.
- 1.2. Must have carefully read and understand all parts of the RFP and certify that the Proposal is made in accordance therewith.

2. SPECIFIC REQUIREMENTS

The District intends to purchase and implement a robust and comprehensive CRM for higher education with the following characteristics:

1. The system should be a Cloud/SaaS based solution.
2. It should be a comprehensive CRM solution covering the following student lifecycle areas:
 - a. Student recruiting including outreach and onboarding
 - c. Analytics and dashboards
 - d. Integrate with District SIS (Ellucian's colleague), LMS (Instructure's Canvas) and related systems in order to communicate about:
 - Admissions and Registration
 - Student Orientation
 - Student Financial Aid and Scholarships
 - Student Accounts and Billing
3. The proposed solution should be implemented at a similar institution (multi-college district).
4. The solution should integrate with currently available social media platforms such as Twitter, Facebook, Instagram, etc.
5. Vendor should identify and provide additional contracts and/or license agreements that the District would be required to sign.
6. The solution should be SAML 2.0 compatible for use with District in Single Sign On (SSO) solution.

7. The solution should be capable of various integration methods that can be used to integrate with the variety of systems listed below. If there are any systems where integration with your solution is automatic (no development required), please note.

- Colleague Student information system
- Canvas learning management system (LMS)
- Office 365
- EAB's Starfish
- Ability to embed in portal, LMS (Canvas), and other college web sites

8. The solution should support two-way text messaging in a manner that 1) allows the replies to be sent through the platform and tracked, and 2) allows for action-based replies.

9. The solution must meet Section 508 standards and support Voluntary Product Accessibility Template (VPAT).

3. EVALUATION CRITERIA

The following is a listing of general and specific criteria used for the evaluation of this RFP. The areas include, but are not limited to:

- 3.1. General quality of responsiveness of proposer:
 - A. Ability to meet all terms and conditions
 - B. Completeness and thoroughness of proposal
 - C. Grasp of scope of work to be performed
 - D. Description of approach to be taken
 - E. Evidence of effective organizational and management practices
 - F. Qualifications of personnel
 - G. Experience and past performance

- 3.2. Specific areas that will be evaluated and scored:
 - A. The professional, technical and managerial qualifications and experience of the firm and the personnel to be assigned to this program.
 - B. Past experience in providing comparable services to other clients.
 - C. Responses to Minimum and Specific Requirements.
 - D. Respondent Questionnaire responses.

Proposals will be evaluated in accordance with the following three-step process:

STEP ONE - Verification of each proposer's compliance with the RFP general terms and conditions as listed in SECTION I and II of this RFP.

STEP TWO – All proposals meeting the criteria as presented in STEP ONE will then be subjected to a "points-earned compliance matrix". An evaluation committee will evaluate and score the proposals. The proposals will be ranked on a "points-earned" matrix.

STEP THREE – The proposers with the highest-ranked proposals will be requested to deliver demonstrations, based on a provided script, to the evaluation committee at our District Office in Martinez, California (see SCHEDULE on page 3). These demonstrations will be evaluated and scored by the committee based on the proposer's ability to meet the District's special needs as outlined in the demonstration script.

SECTION III: SIGNATURE PAGE—4CD-95 RFP

(To be included with proposal submission)

To: Contra Costa Community College District
Attn: John Cook
500 Court St.
Martinez, CA 94553-1278

Pursuant to and in compliance with this Request for Proposal and Pricing Schedule, after carefully reviewing all the terms conditions and requirements contained herein, the undersigned agrees to furnish such services in accordance with this RFP & Pricing Schedule, inclusive of items proposed.

The undersigned declares under penalty of perjury under the laws of the State of California that the representations made in this proposal response is true and correct.

NOTE: ALL ENTRIES SHALL BE LEGIBLE AND SHALL BE PRINTED ABOVE THE LINE PROVIDED.

Type or Print Name/Title

Signature

Date

Name of Company

Address

City State Zip Code

(_____) _____
Area Code Telephone Number Email Address

(_____) _____
Area Code Fax Number

ADDENDA/AMENDMENTS ACKNOWLEDGMENT

Contractor acknowledges receipt of: Addendum Number _____ Dated _____
Addendum Number _____ Dated _____
Addendum Number _____ Dated _____
Addendum Number _____ Dated _____
Addendum Number _____ Dated _____

EXHIBIT A

“Non-Collusion Affidavit”
To Be Executed By Contractor
And Submitted With Proposal

State of California
County of _____

_____, being first duly sworn, deposes and says that he or she is _____ of the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any disclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the contractor has not directly or indirectly induced or solicited any other contractor to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any contractor or anyone else to put in a sham proposal, or that anyone shall refrain from bidding; that the contractor has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the contractor or any other contractor, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other contractor, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the contractor has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

(Date) (Signed at (Place))

Contractor Name Authorized Representative
(Person, Firm, Corp.)

Address Representative's Name

City State Zip Code Representative's Title