

Northeast Iowa Community College

Request for Proposals

Customer Relationship Management System

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Deadline for Submission: July 9, 2021

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PROJECT OVERVIEW

Northeast Iowa Community College is requesting proposals to establish a Customer Relationship Management system (CRM) contract. The goal is to provide NICC with a relationship tracking solution focusing on student recruitment and communications that allows the College to engage in and sustain relationships with students and businesses. The selected vendor will be responsible for delivering, implementing and integrating a CRM solution that achieves NICC's goal. The length of such contract will be five years with an option to extend up to an additional three years. The selected vendor is expected to propose a CRM that meets and/or exceeds the current needs of NICC. Upon completion of implementation, the selected vendor will need to continue providing technical support, maintenance, backup, and general oversight of the CRM product.

INTRODUCTION AND BACKGROUND

Northeast Iowa Community College is a comprehensive two-year institution governed by nine publicly elected Board of Trustee members who each represent a district within the community college district. The college district is nearly 5,000 square miles, with a campus on the north (Calmar) and south (Peosta) ends of its district and service centers in strategic locations (Cresco, Dubuque, New Hampton, Oelwein, and Waukon). NICC serves nearly 6,000 college-aged, adult and high school concurrent enrollment students, and delivers customized training to nearly 7000 businesses, their workforces, and community members, across eight, mostly rural counties. NICC confers certificates, diplomas, and AA/AS degrees across a broad range of programs, including but not limited to Agriculture, Business, Health Care, Liberal Arts, and Manufacturing. NICC employs almost 600 faculty and staff who are distributed across the district. As a college deeply rooted in the communities it serves, NICC places an emphasis on community constituencies in its mission, its actions, and services.

Mission Statement: Northeast Iowa Community College provides in-demand education and training focused on improving lives, driving business success and advancing community vitality.

Vision Statement: Northeast Iowa Community College will be the premier source for in-demand education, workforce training and partnerships, through innovative thinking and talent development.

Values:

Service: We listen, identify and respond to the needs and expectations of our internal and external communities.

Respect: We show consideration for one another and encourage diverse perspectives to build trust, cooperation and accountability.

Stewardship: We use our resources in a responsible, impactful and sustainable manner.

Innovation: We foster the development and advancement of ideas through individual and team creativity.

Integrity: We are ethically accountable to ourselves and others.

Resiliency: We learn from our experiences, refocus and seize the opportunity to improve and persist.

SELECTION and IMPLEMENTATION TIMELINE

(dates after deadline for proposal submissions are subject to change)

Tuesday, June 9, 2021	NICC publishes RFP notice
Monday, June 21, 2021	Deadline for bidders to submit clarifying questions
Friday, June 25, 2021	NICC deadline to publish responses to RFP questions
Friday, July 9, 2021, 4:00pm	Deadline for RFP proposal submissions
Monday, July 19, 2021	Selection approved by NICC Board of Trustees, vendor notified
October 2021	Software installation complete
July 2022	Implementation and integrations complete

Northeast Iowa Community College reserves the right to not award a contract. The dates noted above are estimates, but are reasonable for the purposes of presenting deadlines.

FORMAT of PROPOSAL and SUBMISSION

Submitted proposals must be received at the following email address not later than **4:00 p.m.** on Friday, July 9, 2021.

Name: Kristi Strief
Title: Director of Enrollment Operations
Email Address: striefk@nicc.edu

Responses must be submitted via Adobe PDF format. Attachment limits are 50MB. Proposals received after the proposal deadline date/time will not be considered. NICC's email receipt time stamp will be used for consideration, not the sender's.

SELECTION CRITERIA

Bidders submitting RFPs must be authorized to sign the Vendor Certification form and proposals will be reviewed by a selection committee. The final recommendation will be subject to NICC Board of Trustee approval. No bidder shall acquire any legal or equitable rights regarding the Contract unless and until the Contract has been fully executed by the successful bidder and NICC, at the direction of the Board of Trustees.

OBLIGATION and WAIVERS/GENERAL INFORMATION

Public Information

All material submitted is available for public inspection. Every bidder is hereby notified that no part of their proposal or any other material submitted may be marked as confidential information and that any material so designated by the bidder will be made public information by its inclusion in the proposal.

Errors and Omissions

All documents shall be completed as requested by the College. No claim for errors or omissions in the bidding will be considered. Should a bidder find during the examination of specifications or other contract documents, discrepancies, omissions, ambiguities or conflict among contract documents or be in doubt as to their meaning, it is the responsibility of the bidder to notify Kristi Strief, at striefk@nicc.edu, or Madeline Wagner at wagnerma@nicc.edu, phone 844-642-2338, who will then issue the necessary clarifications to all prospective bidders by means of addenda.

Disclaimers

Any Request for Proposal issued may or may not result in an award contract. NICC reserves the right to waive informalities, irregularities, and technicalities in the proposal process, to cancel any request, any part of any proposal, and to reject any or all proposals at any time, for any reason. Receipt of RFP materials from the College or submission of a proposal to the College confers no rights upon the bidder nor obligates the College in any manner.

The determination of whether any proposal submitted by a bidder does or does not conform to the conditions and specification of this Request for Proposal is the responsibility of the College.

Any award resulting in a contract from this Request for Proposal is invalid until properly approved and executed by the College. If the College awards a contract to a successful bidder, the successful bidder's responses to this Request for Proposal may become part of the contract.

The successful bidder must not commence any billable work until a valid contract is executed.

A contract resulting from the Request for Proposal shall not preclude the College from obtaining equipment or services from other bidders if the successful bidder for this Request for Proposal is unable to satisfy the project needs in an acceptable manner.

Clarification of Proposals

The College reserves the right to obtain clarification of any point in a bidder’s proposal or to obtain additional information. Failure of a bidder to respond to such a request for additional information or clarification could result in rejection of the proposal.

Award

The award of the contract will be to the bidder who in the College’s opinion serves the best interest of the College and has submitted the best proposal that is most responsive to the Request for Proposal, to include the successful bidder’s experience, reputation, price, and ability to perform the contract. The lowest priced proposal is not necessarily the best proposal. NICC reserves the right to reject any or all proposals and to waive minor informalities in any quotation in order to make this award.

Payment

Payment will be made in accordance with the policies and procedures of the Board of Trustees of NICC, District #1. The College will make payment in approximately thirty (30) days following invoicing, completion and acceptance of contract work. NICC is tax exempt as a governmental subdivision of the State of Iowa. Federal ID Tax Number: 42-0924711. No proposal shall include any costs for taxes to be assessed against NICC.

Acknowledgment of Addenda

Original signature of the bidding organization's official on an addendum document shall be construed as an acknowledgment of receipt of any and all addenda pertaining to any specific bid. Identification of addenda by number should be noted on the proposal form, as provided.

Equal Opportunity

It is the policy of NICC that no person shall, on the grounds of race, color, creed, color, religion, sex, age, national origin, ancestry, disability, sexual orientation, gender identity, disability, veterans status, or any other legally protected status be excluded from consideration for employment, denied employment with or be subject to discrimination of any kind by the College.

In accordance with this policy, we support and encourage minority and female participation in all aspects of our institution, as well as with those individuals who interact with us.

Targeted Small Business Procurement Act

NICC recognizes the importance of increasing the participation of businesses owned by minorities, females, and persons with disabilities in public contracts. Under Iowa's targeted small business procurement program, State entities have established procurement goals for the purchase of goods and services supplied by small businesses and targeted small businesses. It is the College's policy to promote the economic development of businesses owned by one or more women, minority persons, service-disabled veterans, or persons with a disability as outlined by the Iowa Targeted Small Business Procurement Act, Iowa Code Chapter 73, Subchapter III. In evaluating whether a targeted small business is able to perform the contract scope and deliverables, NICC will take into consideration the business' production and financial capacity and technical competence.

Non-Discrimination

If awarded the contract, the bidder's company shall not discriminate against any employee or applicant for employment because of race, creed, color, religion, national origin, sex, sexual orientation, age, disability, veteran status, or any other basis where protected by law, except where it relates to a bona fide occupational qualification. In the event of the company's noncompliance with this clause or with any related federal or state regulations, the contract may be canceled, terminated or suspended in whole or in part.

Indemnity Agreement

The Contractor shall indemnify, defend and hold harmless the College, its trustees, and employees against all loss, damage and expense which they may sustain or become liable for on account of any claim, suit, action, allegation, or proceeding brought by a third party resulting from the performance of work under the contract by the Contractor or Subcontractors or due to or arising in any manner from the wrongful act of negligence of the Contractor or Subcontractor or any employee of any of them, about or in connection with which any work incident to the performance of the Contract is carried on. The successful bidder shall be responsible and liable for all acts of its subcontractors. The successful bidder shall be solely responsible for payment to all subcontractors or secondary suppliers that the firm may engage for any of the services required under the contract. To the extent that the College is indemnified under this section, the counsel for the College shall be reasonably satisfactory to the College.

Termination of Contract

Any contract entered into between the College and a successful bidder may be terminated for any reason, or no reason, by either party on 10 days written notice. Unless the College terminates the contract due to a breach of the contract by the organization, the College will only owe the organization for any work performed up to the date of termination of the contract.

Insurance

The bidder awarded the contract shall purchase and maintain, through the term of the contract, worker's compensation, Employers and Professional liability, and umbrella liability coverages, as set forth more fully below. All required insurance policies shall be issued by reputable insurance companies duly authorized to engage in the insurance business in the State of Iowa and as required by law. The Contractor shall cause a Certificate of Insurance to be issued. The Certificate of Insurance shall be provided by an insurance company with the rate of A- (Excellent) or better in the current edition of Best's Key Rating Guide. This Certificate of Insurance must be received and approved before commencement of operations. The Certificate must evidence the following coverage in at least the limits stipulated. The Contract must agree to maintain such insurance for the duration of the project or the term for which services will be rendered.

A. Worker's Compensation (including Occupational Disease) under the terms of the Iowa Workmen's Compensation Act.

B. Employer's Liability: \$500,000

C. Professional Liability (Errors & Liability): \$1,000,000 per occurrence

D. Umbrella policy: \$1,000,000 each occurrence.

The above limit requirements do not relieve the vendor of any damages above the requirements.

The vendor's insurance must also:

- Name NICC on such policies as additional insureds.
- Provide for Waiver of Subrogation on the Auto, General Liability, Work Comp, and Umbrella policies.
- NICC wholly owned subsidiaries, agents, affiliates, owners, officers, directors, and employees are named as Additional Insured on the Commercial General Liability, Auto Liability, and Umbrella Liability coverages.
- Apply on a Primary & Non-Contributory basis.

The Contractor shall not commence work under the Contract until it has obtained all insurance required by this provision and until insurance has been approved by the College. All specified insurance shall be provided by the Contractor and at the Contractor's own expense. Said insurance shall remain in full force and effect until the term of the Contract is completed.

As evidence of the above, the vendor shall submit certificates of insurance on an annual basis. The certificate shall also provide that should the policy be cancelled or materially changed, 30 days written notice prior to the effective date for the change or cancellation shall be given to NICC.

Data and Security

The vendor agrees it will comply with all applicable state, federal and local laws and regulations, including but not limited to, all applicable privacy laws. In its performance of the contract, the vendor may become the holder of confidential and/or private information as defined by applicable laws, and agrees that it, its officers, employees and agents will be bound by these confidentiality and privacy laws and that it will establish procedures for safeguarding the information. The vendor shall recognize NICC's exclusive right to control and use this information. The vendor further agrees it shall make no use of any of the described information, for either internal or external purposes, other than that which is directly related to the performance of the contract.

The vendor agrees to indemnify and hold harmless NICC from any and all liabilities and claims resulting from the unauthorized disclosure by the vendor, its officers, employees or agents of any information required to be held confidential under the provisions of the contract. The vendor must return all source data to NICC. Furthermore, within 30 days of the submission of the final contract deliverable to NICC or within 30 days of contract cessation, the vendor shall destroy all personally identifiable information, data, findings, and any other information or data associated with the project and provide written certification of such destruction.

The vendor must complete the security survey included in Appendix 1, and return in either Excel or .pdf format.

PROPOSAL REQUIREMENTS

Your proposal should clearly define (i) your organization's total capacity and capabilities, (ii) your qualifications to perform the work, (iii) your ability to perform the services outlined in the Scope of Services, (iv) your understanding of NICC, and (v) what differentiates you from your competitors. At a minimum, your proposal shall include the following:

- A. Cover letter: The cover letter shall not exceed 1 page in length, summarizing key points in the proposal.
- B. Table of Contents: Immediately following the cover letter and introduction, include a complete table of contents for material included in the response documents.

- C. Profile of the organization: Briefly furnish background information about your organization, including date of founding, legal form (sole proprietorship, partnership, corporation/state of incorporation), number and location of offices, location of company headquarters/main office, total number of employees' company-wide and total number of employees in the State of Iowa, and principal lines of business. Certify that the organization is legally permitted or licensed to conduct business in the State of Iowa for the services offered.
- D. Overview of the organization: Provide a brief description of your organization, including the total number of supporting personnel related to providing CRM software as described in this solicitation in relation to college and/or higher education projects and the number of years the organization has been engaged in providing similar services. Explain how your organization is organized and how its resources will be applied to NICC's work.
- a) Provide organization's principal(s) and staff commitment in providing the services in this solicitation.
 - b) Provide organization's overall ability in providing the services and describe the projects your team has been associated with in providing the services described in this solicitation.
 - c) Demonstrate organization's understanding, knowledge and experience of the project requirements.

E. Qualifications & experience of the organization: Balance of this section should establish the ability of the organization and its sub-consultant, if any, to satisfactorily perform the required work.

Provide two references where your organization has provided similar installation during the past 3 years including but not limited to, state institutions of higher education, public or private two-year colleges, school districts, and other special authorities and districts.

NICC may verify all information furnished. As a minimum, include the following per project experience:

- 1) Project Name, Location – Year Completed.
- 2) Brief project description describing your experience, work performed by your organization and work subcontracted.
- 3) Customer's Name, title, and current phone number.
- 4) Identify organization's role; completion date; and contract name(s).

- 5) The methods of delivery used and how the organization maintains quality control.
- 6) Provide documented experience in providing the types of services described herein especially related to community college or higher education experience and with regard to accomplishment of past projects involving CRMs and related services. List if organization was prime or subcontractor.
- 7) Provide a detailed list of goals that were realized during the engagement and time required in completing for each item noted above.

F. Complete the Scope of Services and Appendices 1. and 2.

G. Pricing Proposal:

NICC reserves the right to seek clarification and negotiate all proposed costs it deems in its own best interests. For the purposes of this RFP, Northeast Iowa Community College will review the overall rate structure to evaluate its reasonableness for the anticipated work. Failure to fully disclose any fees or cost and to comply with the requirements herein may be cause for NICC to reject, as non-compliant, a proposal from further consideration.

Bidder shall specifically state the fees proposed for the work and services as described in this RFP. If there are any services described that would not be included in such compensation, state it specifically, along with any proposed additional charges. Price proposals will include all fees, costs, charges and other amounts, associated directly or indirectly, with providing all things necessary to perform the work for NICC. Please include a description of any discount offered to NICC and an outline of any other fees or charges.

Include the following in the pricing proposal:

- Implementation
- Customer Support
- User Licenses
- Marketing and Communication Features
- Form Development
- Reporting
- Modules: Recruitment, Advising and Advancement, Integration, Chat, Artificial Intelligence/Chatbot and Texting

Additional details are provided in the Scope of Services.

SCOPE OF SERVICES:

Software Capabilities: Complete the attached spreadsheet, Appendix 2, detailing the specific software capabilities of the CRM solution. Responses should be submitted in PDF or Excel format with an attachment limit of 50MB.

Security: Complete the attached Security Questionnaire, Appendix 1, detailing your security protocol and safeguards. Responses should be submitted in PDF or Excel format with an attachment limit of 50MB.

User Licenses: Detailed per user for additional purchase if needed. Please describe if the license is unique to each user or if it is a simultaneous user license.

- Student: 10,000
- Mobile: 10,000
- Power/Full User: 75
- Administrator: 2
- Team/Faculty User: 125
- Report Administrator: 5

Integration: Pricing proposal should include support from an integration partner to assist with one direction and bi-directional integration of the following software systems. Bidder must have proven experience with a successful integration of the following: Augusoft, Ellucian, D2L Brightspace. It is also a requirement to integrate GSuite, Softdocs, Terminal Four, Mitel, texting and online appointment scheduling.

- [Augusoft - Lumens Student Information System](#)
- [Ellucian - Colleague Student Information System](#)
- [D2L Brightspace Learning Management System](#)
- [GSuite](#)
- [Softdocs](#)
- [Terminal Four](#)
- [Mitel](#)
- Texting ([Signal Vine](#); [Mongoose](#); TBD)
- Online Appointment Scheduling (Vendor TBD)

VENDOR'S CERTIFICATION FORM

(Must be returned with bid proposal.)

By signing this required form, the undersigned agrees the said contractor/vendor is responsible as defined herein. This information may be used as a criteria in the evaluation of vendors. Failure to comply with any of the requirements herein may result in disqualification of your proposal.

The undersigned states that the person is authorized to sign the proposal.

By: _____ Date: _____
(Signature of Company Official)

(Title of Company Official)

Appendices

Open and download to submit as an Excel file. Do not type in the Google file.

[Appendix 1](#)

[Appendix 2](#)