



Truman State University

Purchasing Department

McClain Hall 106

100 E. Normal Ave.

Kirksville, MO 63501

Phone: 660-785-4326

Fax: 660-785-7337

Email: kmurphy@truman.edu

Website: <http://www.truman.edu/businessoffice/purchasing/>

March 31, 2020

REQUEST FOR PROPOSAL (RFP)

SLATE CRM CONSULTANT SERVICES

PROJECT SP20-17

SUBMITTAL DEADLINE	SUBMIT
2:00 P.M. CDT Local Time, Tuesday, April 21, 2020	Original plus Five (5) duplicate copies and One (1) electronic copy via Thumb Drive
DELIVERY BY MAIL	DELIVERY BY HAND
Truman State University Attn: Kim Murphy, CPPO, CPPB Purchasing Department 106 McClain Hall 100 E. Normal Ave. Kirksville, MO 63501	Truman State University Purchasing Department 106 McClain Hall Kirksville, MO 63501

Submittals from minority, women and disadvantaged business enterprises are encouraged.

Faxed or Electronic submissions will NOT be accepted



PROPOSER REGISTRY FOR NOTIFICATION OF INTENT TO RESPOND

Truman State University

Project SP20-17 Slate CRM Consultant Services

Please complete and submit this form prior to the submittal deadline as shown on the Request for Proposal document. Please fax to 660-785-7337 or email to kmurphy@truman.edu. This page is not part of the RFP package and must be submitted to notify Truman State University of your interest in this project and for Truman to notify your organization of any addenda. These addenda are issued if there is a need to change the specifications or closing date/time of the request.

INTENT TO RESPOND STATEMENT

____ YES Our organization plans to submit a response to this solicitation for bids:

NO RESPONSE STATEMENT

____ No Our organization is not submitting a response for the following reason(s):

- | | |
|---|--|
| <input type="checkbox"/> We do not offer this commodity and/or service or an equivalent | <input type="checkbox"/> Insufficient time to respond to the invitation to bid. |
| <input type="checkbox"/> Our schedule would not permit us to perform | <input type="checkbox"/> Cannot meet delivery requirements |
| <input type="checkbox"/> The project is too small | <input type="checkbox"/> Licensing restrictions (please explain) |
| <input type="checkbox"/> The project is too large | <input type="checkbox"/> Other reasons or additional comments (please explain below) |

Name of Organization: _____

Contact Name: _____

Contact Address: _____

Contact Phone Number: _____ Fax Number: _____

Contact Email Address: _____

**REQUEST FOR PROPOSALS
FOR
SLATE CRM CONSULTANT SERVICES**

Project No. SP20-17

**TRUMAN STATE UNIVERSITY
Kirksville, Missouri**



March 2020

Proposal Opening Date: April 21, 2020

Time: 2:00 PM CDT

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Request for Proposal – Notice to Vendors

Truman State University is requesting sealed proposals from qualified firms to provide Slate - CRM consulting services for the University.

Proposals are to be addressed and delivered to the Purchasing Department, 106 McClain Hall, Truman State University, Kirksville, MO 63501 until Tuesday, April 21, 2020 at 2:00 PM CDT, , at which time the names of those firms or individuals submitting proposals will be read aloud. No other public disclosure will be made until after an award of the contract.

Request of Proposal documents are available from the University by contacting the below address or on the Purchasing Website at <http://www.truman.edu/businessoffice/purchasing/open-bids/>.

A one-page Proposer Registry for Notification of Intent to Respond to this RFP document is the second page of the RFP document. This form is required if you plan to submit a proposal and wish to receive any (1) RFP addenda and (2) answers to questions regarding the RFP or addenda that have, in the University's opinion, general applicability.

The University's delivery address is:

Truman State University
Purchasing Department
McClain Hall 106
100 East Normal
Kirksville, MO 63501



Kim Murphy, CPPO, CPPB
Purchasing Supervisor
Truman State University

TRUMAN STATE UNIVERSITY

REQUEST FOR PROPOSAL FOR SLATE CRM CONSULTING SERVICES

A. PURPOSE

Truman State University (“Truman or University”) is soliciting proposals from independent consulting Firms to assist the University with our CRM system, Slate. With changes in leadership and a re-organization of the admissions staff, we need assistance building functionality and managing Slate during this transition. Ideally, we need an assessment of current usage, staffing resources and current capacity as well as support during the transition period from a long standing Slate administrator to a new Slate manager. Special emphasis on managing multiple communication plans and supporting portals will be required.

B. BACKGROUND

Truman State University is one of the two most selective 4-year public universities in Missouri. The institution is designated as the statewide liberal arts and sciences university. Truman’s mission includes providing high quality undergraduate and graduate programs designed to meet statewide needs for approximately 6000 students. Truman’s Carnegie Classification is Master’s Colleges and Universities (medium programs) and offers 48 bachelor degree programs and 9 master degree programs. Truman is focused on sustaining substantive relationships between students and faculty, recognition of cultural and intellectual diversity, and a commitment to high-quality liberal arts education for those who may not achieve it otherwise. The University is accredited by North Central Association of Colleges and Schools and The Higher Learning Commission.

Truman primarily serves full-time undergraduate degree seeking students in a residential environment. Over 68% are Missouri residents, approximately 7% are international students, and the balance comes from 40 different states. More than 40% of the student population lives in on-campus housing and most of the other students reside in Kirksville. Nearly half of Truman’s undergraduates go on to pursue graduate education. The academic profile of Truman students reflects academically talented scholars with 25-30 mid-range ACT composite scores or SAT equivalent, a high school grade point average of 3.75 and impressive extracurricular records. Typically nearly 95% of new freshmen graduated with a 3.25 and more than 75% ranked in the top 20% of their high school graduating class.

Truman is consistently ranked among the nation’s best colleges. For 21 consecutive years, U.S. News and World Report have recognized Truman as the No. 1 public university in the Midwest Regional Category. Other accolades include being recognized by Washington Monthly, which listed Truman as the No. 4 master’s university in the nation and Kiplinger’s Personal Finance magazine, which ranked Truman as No. 19 among the 100 best college values in the nation. More information about Truman and what others have to say about the University can be found at <https://www.truman.edu> and <https://www.truman.edu/about/facts-about-truman/points-of-pride/>.

C. SCOPE OF WORK

The consulting Firm must be able to provide the following:

1. Holistic evaluation of current CRM usage and resources.

2. Support to help create comprehensive communication plans that support a variety of target markets. Support and training for Slate programming and software development.
3. Provide coaching and mentoring for new Slate lead and team.
4. Provide best practice recommendations for Slate regarding event management, communication plans, portals, and management.
5. Post-recommendation support and availability by phone, email, or personal meetings.

C. SUBMISSION OF PROPOSAL & CONTRACT AWARD

Proposal responses must be signed, sealed and returned (with all necessary attachments) to the following address on or before 2:00 PM on Thursday, April --, 2020.

Truman State University
Purchasing Department
106 McClain Hall
Kirksville, MO 63501
Attn: Kim Murphy, CPPO, CPPB

One (1) original and five (5) copies of the proposal response with one (1) electronic copy via thumb drive are required to be submitted. Proposal responses will not be accepted by fax machine. All proposals shall be sealed in a package and clearly marked "Request for Proposal, Project SP20-17 for "Slate CRM Consulting Services". Proposals will be accepted up to the time and date shown as indicated above. Firms are responsible for ensuring that proposals are received by the deadline. Proposals received after the deadline will be considered non-responsive and will be removed from consideration on this basis.

Before submitting a proposal, Firms should become thoroughly familiar with all contract conditions referred to in this document, and any addenda issued before the proposal submission date. Such addenda shall form a part of the RFP. It shall be the Firm's responsibility to ascertain that the proposal includes all addenda issued prior to the proposal submission date.

All copies and contents thereof of any proposal, attachment, and explanation thereto submitted in response to this Request for Proposal, except copyright material, shall become the property of the University. All copyright material must be clearly marked.

If your proposal contains any information you consider to be proprietary, you must place it in a separate envelope and mark it "Proprietary Information". The University is the final authority as to the extent of material that is considered proprietary or confidential. Pricing information cannot be considered proprietary.

The University reserves the right to reject any or all proposals or any part thereof, or to accept any proposal, or any part thereof, or to withhold the award and to waive or decline to waive irregularities in any proposal when the University determines that it is in their best interest to do so.

Any award of a contract/purchase order resulting from the RFP document will be made only by written authorization (contract/purchase order) from the Purchasing Department.

Specific questions regarding specifications and technical requirements of this RFP document must be submitted in writing and forwarded to the address noted above and directed to the Purchasing Department, Kim Murphy, Purchasing Supervisor; faxed to 660.785.7337 or emailed to kmurphy@truman.edu. Submission questions and subsequent responses will be issued as an addendum to all prospective Firms on file. No addenda will be issued later than 72 hours prior to the time and date scheduled for the receipt of responses except an addendum postponing or withdrawing the RFP.

Firms must show evidence of financial responsibility to enter into this relationship and to fiscally sustain this project by providing current audited financial statements, which includes the most current quarter and last year-end including Balance Sheet and Income Statement for their company. Please include a description of any litigation in which the Firm's company is currently involved, as well as indicating any potential conflict of interest and plans for avoiding the conflict. The Firm should place this information in a separate, sealed envelope, marked with "Financial Statements", and place with the "Original" response only. This information will be used to determine overall financial strength of the Firm's company and will be maintained as confidential information by the University.

Disclosure of any information to the possibility of proposed takeovers; both for this company by another company, or any takeovers of other service providers by this company, must be provided.

If the Firm plans to subcontract any of the work described in the scope of work, the Firm must respond to all items for each proposed subcontractor. If a Firm plans a joint venture with another company, the Firm shall specify accordingly and respond to all items for each company involved in the joint venture.

Proposals shall be prepared simply and succinctly providing a straightforward, concise description of the Firm's abilities to satisfy the requirements of this request. Emphasis shall be on completeness and clarity of content.

To facilitate the evaluation process, Firms are requested to organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein. Each distinctive section should be titled with each individual evaluation category and all materials related to that category should be included therein. Firms are requested to provide the requested information in their response.

E. PROPOSAL REQUIREMENTS

The Firm must respond to this RFP document by submitting all data required herein for their proposal response to be evaluated and considered for award. Failure to submit such data may be deemed sufficient cause for disqualification of a proposal response from further consideration for award.

Proposal responses should be as thorough and detailed as possible so that Truman may properly evaluate the Firm's capabilities to provide the required services. Experience, reliability, and economic stability of the Firm's organizations are considered in the evaluation process. Therefore, the Firm is advised to submit any information that documents successful and reliable experience in past performances, especially those performances related to the requirements of the RFP document, as well as financial backing of the organization to ensure successful completion of the contract.

In order to facilitate the analysis of responses to this RFP, vendors are required to prepare their proposals in accordance with the instructions outlined in this section. Each vendor is required to submit their proposal in a sealed package. Vendors whose proposals deviate from these instructions may be considered non-responsive and may be disqualified at the discretion of Truman.

Proposals should be prepared as simply as possible and provide a straightforward, concise description of the vendor's capabilities to satisfy the requirements of the RFP. Expensive bindings, promotional material, etc., are not necessary or desired. *Effort should be concentrated on accuracy, completeness, and clarity of content.* All parts, pages, figures, and tables should be numbered and labeled clearly. The proposal should be organized into the following major parts, explained below:

<u>Section</u>	<u>Title</u>
1	Consulting Firm's Capabilities
2	Approach to Project Timeline
3	Schedule of Fees
4	Project Team Experience
5	References
6	IT Standards and Requirements Questionnaire

1. Consulting Firm's Capabilities (Section 1)

- a. Executive summary of not more than three pages highlighting why the consulting Firm believes it is best qualified to conduct the engagement.
- b. Information on the consulting Firm's history and expertise within higher education.
- c. Description of the consulting Firm's experience relating to higher education CRM consulting.
- d. Location of the principal office of the consulting Firm and if different, the office from which the proposed work will be accomplished.
- e. List of CRM consulting clients served over past 24 months.

2. Approach and Project Timeline (Section 2)

- a. Detail the consulting Firm's approach or plan to be followed. Include a suggested timetable for the project. Also include expectations regarding data or other information required from Truman for the project.

3. Schedule of Fees (Section 3)

- a. Provide a detailed schedule of fees for the services described in the Scope of Work, pricing each requested service separately
- b. Include an itemization of any non-recurring costs and a schedule of hourly rates to be charged in the event a change order or request for additional service is issued during the engagement.

4. Project Team Experience (Section 4)

- a. Provide an overview as well as more detailed resumes of the staff members whom the consulting Firm has tentatively identified as assigned to this engagement.
- b. The consulting Firm must be able to assign a dedicated team/individuals with specific Slate CRM expertise.

5. References (Section 5)

- a. A minimum of 3 references from organizations or professionals who have worked with institutions of similar size and complexity. This must include the name, title, telephone number, e-mail address for each reference. If possible, institutions with a selective admission process in the public sector should be included. Ideally, references represent institutions located in a rural setting.

6. IT Standards and Requirements Questionnaire (ITSRQ) (Section 6)

- a. The IT Standards and Requirements Questionnaire (ITSRQ) must be completed and returned for all projects that involve the purchase of any IT System, software, components or distribution of University data. The questionnaire is a separate document posted on the Purchasing Open Bids web page at <https://www.truman.edu/businessoffice/purchasing/open-bids/> and titled “IT Standards and Requirements Questionnaire (ITSRQ)”. Forms that must be printed and signed must be included in the paper copies of the proposal. The completed Excel spreadsheet must be saved on the electronic copy submitted on a thumb drive as a separate file. Complete only those tabs that are applicable to the product or service that applies to your proposal.

F. Evaluation Method for Proposals

1. All proposals received from qualified Firms will be evaluated. Truman reserves the right to accept or reject any or all proposals submitted for consideration. In addition, Truman reserves the right to negotiate specific aspects of a proposal submitted. The selection committee will first determine whether a proposal satisfies the requirements stated in this RFP document.
2. All responsive and responsible proposals will be subjected to a comparative assessment of the published evaluation criteria. The award of a contract/purchase order will be based on the best proposal response in accordance with the evaluation criteria listed below:
 - a. Qualifications relating to similar type of work to include prior experience and demonstrated ability in related services, performance record and quality of work specifically with Slate
 - b. Fee Structure: Review of provided fee structure.
 - c. Recommendations from references for similar services.
 - d. Financial Stability of the Firm.
3. The University reserves the right to make an award to the responsive and responsible Proposer whose service meets the terms, conditions and specifications of the RFP and whose proposal is considered to best serve the University’s interests. Award of the contract will be made to the Firm who provides the best combination of services, cost and value as determined by Truman.
4. After the initial screening process, those Firms whose proposals are selected for further consideration may be asked to participate in a conference call or on-campus presentation with the committee in advance of the final selection. Firms who are selected to participate in a conference call or presentation will be contacted. It is requested that the person who will be directly responsible for servicing the account be present on this call. Firms are cautioned not to contact employees of Truman concerning this RFP during the evaluation process.

5. Truman reserves the right to consider historic information and fact, whether gained from the Firm's proposal response, question and answer conferences, references, or any other source, in the evaluation process. Truman shall have the right to take such steps as it deems necessary to determine the ability of a Firm to perform the work, and each Firm shall furnish to Truman such information and data for this purpose as it may request. The right is reserved to reject any proposal response where an investigation, or consideration of the information submitted by such Firm, does not satisfy Truman that the Firm is qualified to carry out properly the terms of these specifications.
6. The Firm is cautioned that it is the Firm's sole responsibility to submit information related to the evaluation categories and that Truman is under no obligation to solicit such information if it is not included with the Firm's proposal response. Failure of the Firm to submit such information may cause an adverse impact on the evaluation of the Firm's proposal response.
7. Pursuant to Section 610.021 RSMo, proposals and related documents shall not be available for public review until after a contract is executed or all proposals are rejected. Truman will notify all Firms responding to this RFP the Firm whom has been selected to perform these services. Any proposal award protest must be received within 10 days after the date of notification of award in accordance with the State statute.

G. General Contractual Requirements

1. The contract between Truman and the selected Firm shall consist of (1) RFP and any amendments thereto, and (2) the proposal submitted by the selected Firm in response to this RFP. In the event of a conflict in language between the two documents referenced above, the provisions and requirements set forth and/or referenced in the RFP shall govern. However, Truman reserves the right to clarify any contractual relationship in writing with the concurrence of the selected Firm and such written clarification shall govern in case of conflict with the applicable requirements stated in this RFP or the selected Firm's proposal response. In all other matters not affected by the written clarification, if any, the RFP shall govern. The Firm is cautioned that its proposal shall be subject to acceptance by Truman without further clarification.
2. Any change in the contract including the Scope of Work described herein, whether by modification or supplementation, must be accomplished by a formal contract amendment signed and approved by and between the duly authorized representatives of the selected Firm and Truman. Any amendments to the contract shall (1) specify an effective date; (2) specify any increases or decreases in the amount of the selected Firm's compensation, if applicable; (3) describe changes, if any, to the provisions of the contract; (4) be entitled as an "Amendment"; and (5) signed by the parties identified in the preceding sentence. The selected Firm expressly and explicitly understands and agrees that no other method and/or no other document, including correspondence, acts, and oral communications by or from any person, shall be used or construed as an amendment to the contract.
3. All reports, data and materials developed or acquired by the selected Firm as a direct requirement specified in the contract/purchase order shall become the property of Truman. All reports, data or materials that may reveal names or identification numbers of individuals, employees, or corporate entities, if not returned to Truman, must be properly destroyed so as to keep such information confidential. No reports or materials prepared, as required by the contract/purchase order, shall be released to the public without the prior written consent of Truman.

4. The selected Firm shall not at any time sell, convey, transfer, mortgage or assign any interest in the contract/purchase order, either in whole or in part, nor any of its rights, title, interest or privilege hereunder whatsoever, in the contract/purchase order without the prior written consent of Truman.
5. Firms agree that they presently have no interest and shall not acquire any interest, directly or indirectly, which would conflict in any manner or degree with the performance of the services hereunder. Firms further agree that no person having any such known interest shall be employed or conveyed an interest, directly or indirectly, in the contract/purchase order.
6. Firms shall not provide any perquisites, favors, or gifts to any Truman employees which tend to curry favor with any specific persons or which incur expenses to be borne by Truman. Firms shall not attempt to gain support and appreciation from any group of employees other than providing the high quality consulting services possible.
7. Firms shall not offer any gift to the University or its Board of Governors or the Truman State University Foundation or its Board of Directors or any of their representatives pursuant to an active or open bidding, purchasing or any other procurement process.
8. Upon filing for any bankruptcy or insolvency proceeding by or against the Firm, whether voluntary or involuntary, or upon the appointment of a receiver, trustee or assignee for the benefits of creditors, the Firm must notify Truman immediately. Upon learning of such actions, Truman reserves the right at its sole discretion to either cancel or reaffirm the contract.
9. Truman may cancel the contract at any time for a breach of any contractual obligation by providing the selected Firm with a written notice of such cancellation. At its sole discretion, the University may give the Firm an opportunity to cure the breach or to explain how the breach will be cured. If the Firm fails to cure the breach, the University reserves the right to obtain services to be provided pursuant to the contract from other sources and charge the contractor for any additional costs incurred as a result. Should Truman exercise its right to cancel the contract/purchase order for such a reason, the cancellation shall become effective on the date as specified in the Notice of Cancellation sent to the selected Firm.
10. Truman reserves the right to terminate the contract at any time without penalty or recourse, by giving written notice to the Firm at least 30 days prior to the effective date of such termination. In the event of termination pursuant to this paragraph, all documents, data, reports, supplies, equipment and accomplishments prepared, furnished or completed by the Firm pursuant to the terms of the contract shall, at the option of Truman, become the property of Truman. The Firm shall be entitled to receive just and equitable compensation for that work completed pursuant to the contract prior to the effective date of termination.
11. Any written notice of the Firm shall be deemed sufficient when deposited in the United States mail, postage prepaid, and addressed to the Firm or at its address as listed on the signature page of the contract, or as such address as the Firm may have requested in writing.
12. Neither party shall be held responsible for any losses resulting if the fulfillment of any terms or provisions of the Agreement which are delayed or prevented by any cause not within the control of the party whose performance is interfered with, and which by the exercise of reasonable diligence, said party is unable to prevent.
13. Indemnification. Any and all claims that arise or may arise against selected Firm, its agents, servants or employees as a consequence of any act or omission on the part of selected Firm or its agents, servants, employees while engaged in the performance of the contract shall in no way be the

obligation or responsibility of Truman. The selected Firm shall indemnify, hold harmless and defend Truman, its Board of Governors, its officers and employees against any and all liability, loss, costs, damages, expenses, claims or actions, including attorney's fees which Truman, its Board of Governors, its officers or employees may hereafter sustain, incur or be required to pay, arising out of or by reason of any act or omission of selected Firm, its agents, servants or employees, in the execution, performance, or failure to adequately perform selected Firm's obligations pursuant to this Contract. Truman shall also be indemnified for any attorney's fees it incurs in enforcing this indemnification provision or any other indemnification provision in the contract.

14. As a public institution, Truman must follow State of Missouri rules and regulations regarding the procurement of services. Data obtained through this consulting process must be handled as confidential and may not be shared with other Firms who may want to do business with Truman without the prior written approval of the University's Purchasing Department. Any future business with Truman will be obtained through a proposal process.
15. The contract shall be construed according to the laws of the State of Missouri. The Firm shall comply with all local, state and federal laws and regulations related to the performance of the contract to the extent that the same may be applicable.
16. The Firm represents himself/herself to be an independent contractor offering such services to the general public and shall not represent itself or its employees to be an employee of Truman. Therefore, the selected Firm shall assume all legal and financial responsibility for taxes, FICA, employee fringe benefits, workers compensation, employee insurance, minimum wage requirements, overtime, etc. and agrees to indemnify, save and hold Truman, its officers, agents and employees, harmless from and against any and all loss; cost (including attorney fees); and damage of any kind related to such matters.
17. The selected Firm and all subcontracted Firms doing business with Truman must agree not to discriminate on the basis of race, color, religion, national origin, sex, disability or veteran status. If discrimination by the selected Firm or subcontracted Firm is found to exist, Truman will take appropriate action which may include, but not be limited to, cancellation of the contract, removal from all bidders' lists until corrective action is made and ensured, and referral to the Attorney General's Office.

**TRUMAN STATE UNIVERSITY
PROPOSAL CERTIFICATION**

The Firm certifies it is authorized to obligate the represented firm and further agrees with all terms, conditions, and requirements of the Truman's RFP.

The Firm further certifies the responses and resulting proposal to Truman's Request for Proposal are true and accurate.

In submitting a response to Truman's RFP, the Firm understands that Truman retains the right to reject any and all proposals and to waive irregularities and informalities therein, and to award the contract in the best interests of Truman. It is also understood that proposals may not be withdrawn for a period of **30 days** after the date and time set for the receipt of proposals.

The Firm hereby affirms:

- (1) That I am the Firm (if the Firm is an individual), a partner in the Firm (if the Firm is a partnership), or an officer or employee of the Firm having authority to sign on its behalf (if the Firm is a corporation);
- (2) That the proposal has been arrived at by the Firm independently, and has been submitted without collusion with, and without any agreement, understanding, or planned common course of action with, any other vendor of materials, supplies, equipment or services described in the RFP designed to limit independent bidding or competition;
- (3) That the contents of the proposal has not been communicated by the Firm or its employees or agents to any person not an employee or agent of the Firm or its surety on any bond furnished with the proposal, and will not be communicated to any such person prior to the official opening of the proposal; and
- (4) That the Firm has fully assured in regarding of the accuracy of the statements made in their response.
- (5) The Firm is registered with and maintains good standing with the Secretary of State of the State of Missouri, as may be required by law or regulation.
- (6) The undersigned certifies that their Firm (check one) _____ IS or _____ IS NOT currently debarred, suspended, or proposed for debarment by any federal or state entity. The undersigned agrees to notify the University of any change in this status, should one occur, until such time as an award has been made under this procurement action.

In compliance with this RFP document, Project No. SP20-17, and after carefully reviewing all the terms, conditions, and requirements contained therein, the undersigned agrees to furnish such services in accordance with the specifications of this RFP.

Authorized Signature

Date

Print Name

Title

Company

Federal Tax ID No.

Telephone Number

Address

Fax Number