



**JACKSON STATE UNIVERSITY  
Request for Proposals (RFP) 23-13  
Customer Relationship Management System**

**ISSUE DATE:** February 15, 2023

**ISSUING AGENCY:** Office of Purchasing and Travel  
Jackson State University  
P.O. Box 17029  
1400 John R. Lynch Street  
Jackson, MS 39217

Sealed proposals, subject to the conditions made a part hereof, will be received until **Wednesday, April 5, 2023 at 11:00 a.m. in the JSU Office of Purchasing and Travel**, same address as above, for furnishing services as described herein.

**IMPORTANT NOTE:** Indicate firm name and RFP number on the front of each sealed proposal envelope or package.

**All inquiries regarding this RFP should be directed to:**

Laura Furdge (**Primary Contact**)  
Office of Purchasing and Travel (same address as above)  
601-979-0869  
[laura.r.furdge@jsums.edu](mailto:laura.r.furdge@jsums.edu)

**Copied to** Alternate Contacts:

Emily Tschiffely  
Director of Procurement Services  
601-979-0978  
[emily.c.tschiffely@jsums.edu](mailto:emily.c.tschiffely@jsums.edu)

**AND**

Brenda Nash-Jefferson  
Contracts Specialist  
601-979-0699  
[brenda.l.nash-jefferson@jsums.edu](mailto:brenda.l.nash-jefferson@jsums.edu)

**Note:** Questions concerning this RFP must be submitted in writing and will be accepted until **March 8, 2023 at 5:00 p.m.** A summary of all questions and answers will be posted at <https://www.jsums.edu/finance/bid-information/> as an addendum located under RFP 23-13 by March 15, 2023 at 5:00 p.m. Any addendum associated with this RFP will be posted at <https://www.jsums.edu/finance/bid-information/> located under RFP 23-13. It is the Respondent's

responsibility to assure that all addenda have been reviewed and, if applicable, signed and returned.

**RFP Response Checklist** – Include these items in your response to RFP 23-13.

\_\_\_\_\_ (1) One clearly marked “Original” response, an electronic copy in PDF files on a flash drive, and three (3) identical copies of the complete proposal. All response packages must be clearly labeled with “CRM System,” the Vendor’s name and “RFP 23-13.”

\_\_\_\_\_ (2) Submission Cover Sheet APPENDIX A, signed and dated accompanied by a Cover Letter indicating the scope of the proposal. In addition, the letter should include a statement indicating the ability to comply with all requirements of this RFP and acceptance of JSU’s standard contract. The letter should include a statement of exceptions to any of the terms and conditions outlined in this RFP, if needed. Cover letter should explain why your firm would be the best choice for JSU. Any corporate-wide programs, performance standards and metrics, unique features, key initiatives, and the corporate support structures pertinent to JSU should be included.

\_\_\_\_\_ (3) Vendor Response to Management Requirements Questionnaire plus an overview of vendor qualifications, organizational profile (including operation under other Vendor names providing the same or similar services) and organizational chart. Describe how the organizational structure will ensure orderly communications, distribution of information, and effective coordination of activities, accountability, and decision-making authority.

\_\_\_\_\_ (4) References: Provide three (3) similar or like clients as references, for which Respondent has performed (or is currently performing) work similar in nature and scope within the last five (5) years. Information should include:

- Institution
- Institution’s Address
- Contact name, telephone number, and email
- Similarity with scope and size of the JSU
- Length of time services have been provided

\_\_\_\_\_ (5) **In a separately sealed envelope – Technical & Cost Specifications Response – NO INFORMATION IDENTIFYING THE VENDOR SHALL BE INCLUDED.**

The proposal package must be received on or before 11:00 a.m. on April 5, 2023. It is the responsibility of the Respondent to ensure that the proposal package arrives in the Office of Purchasing and Travel on time. The proposal package should be delivered or mailed with return receipt requested to:

OFFICE OF PURCHASING AND TRAVEL  
JACKSON STATE UNIVERSITY  
P.O. Box 17029  
1400 John R. Lynch Street  
Jackson, MS 39217

When using a delivery service or hand delivering, the address is: H.P. Jacobs Administration Tower, 4<sup>th</sup> Floor, Office of Purchasing & Travel, Jackson State University, 1400 John R. Lynch Street, Jackson, MS 39217. Deliveries can be made during this office's normal business hours of 8:00 a.m. to 5:00 p.m.

**JSU reserves the right to reject any and all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal or all items, if deemed in the best interest of the University to do so.**

**In addition, the proposer shall not be in contact with any other Jackson State University representative(s) other than the listed contacts during this procurement process.**

Proposals received after the stated due date and time will not be accepted. Submission via facsimile or other electronic means will not be accepted.

### **UNIVERSITY OVERVIEW**

Jackson State University is a 4-year Carnegie High Research Public University located in Jackson, MS. The University is accredited by the Commission on Colleges of the Southern Association of Colleges and Schools to award Bachelors, Masters, Education Specialist, Doctor of Education, and Doctor of Philosophy degrees. JSU is organized under the leadership of its President, Thomas Hudson, J.D. For an expanded view of JSU and its programs, please visit the JSU web site at [www.jsums.edu](http://www.jsums.edu).

### **STATEMENT OF PURPOSE**

Jackson State University (JSU) is seeking to purchase a comprehensive student success technology tool that connects prospective and current students, University personnel, and other key stakeholders utilizing research, data analysis, networking, change management, and implementation support to include technical support. JSU intends to enter into an

agreement with one entity for the purchase and fulfillment of all deliverables and scope of work.

JSU defines this system as a tool for managing interactions and relationships with prospective students and other constituents. The tool should organize, automate and synchronize business processes, operations, communications, marketing, customer service, data analysis and reporting among many campus offices. Additionally, this system will be used to provide services to and retain current students on their degree paths.

## **TECHNICAL AND COST DETAILED REQUIREMENTS AND SPECIFICATIONS**

### **Overview**

Jackson State University seeks a Customer Relationship Management Tool with front office and back office capabilities. An overview of this solution is described below:

1. The solution will support recruitment, admissions, enrollment, communications, marketing as well as the reporting and comparative analysis needs of these operations. Comprehensive integration of all these elements is required.
2. The system must be highly configurable with customizable workflows and prompts that enable automation throughout all stages of the student lifecycle. This system will be built on JSU's unique behavior and activity data as well as business rules and State of Mississippi statutes and regulations.
3. Automated data synchronization with other JSU applications and data systems. The solution must be capable of automated synchronization with Ellucian Banner, JSU's Student Information System (SIS).
4. A well developed, well documented API that allows access to raw data and enables integration with other data sources.
5. Comprehensive and flexible reporting features that allow JSU real-time dynamic analysis and scheduled delivery of reports.
6. Prospective student application feature that is completely self-service.

JSU requires the system to be scalable and meet the enterprise-wide needs of the University. The solution should span the entire student lifecycle from attracting prospective students through their successful time in a degree program to their graduation and transition to alumni.

JSU anticipates that the system will start with marketing to prospects, shepherding recruits to being fully enrolled. Subsequently, the system would include workflows that involve campus offices such as Financial Aid, Student Records, Student Services and Academic Advising.

JSU seeks a robust, intuitive and user-friendly tool that increases functional users' efficiencies in providing successful outcomes.

### **Hardware, Software, & Maintenance Requirements**

1. To address JSU's strategic priorities of promoting student success and retention, craft a service model to support change management as needed for optimization throughout the membership. To improve outcomes across JSU's Team, this service model should combine an in-depth partnership between the vendor's service team and JSU to prepare the institution for ongoing utilization.
2. JSU is seeking a hosted cloud solution. Vendors are asked to define the environment required to run the software in their proposals. Define the hardware and software requirements to operate system as proposed.
3. Vendors are asked to describe the hosted environment, the hardware and software requirements, and outline the uptime and downtime and the capabilities JSU will have to query the data contained. Detail all of the specific scenarios that may negatively affect the solution's performance.
4. JSU requires test, development and production environments of this solution. Please provide detail of each environment in your proposal.
5. JSU requires managed services support from the vendor during the term. Please detail and describe how that will be administered in your proposal.
6. JSU requires appropriate procedures that ensure the integrity of all data in case of system failure. Describe how your solution addresses this need.
7. JSU expects the solution to seamlessly integrate to interfacing systems on multiple and diverse platforms. We expect this capability throughout the term.
8. We require the solution, when successfully interfaced and operational with all other JSU systems, not negatively impact or slow SIS performance. Detail how you will meet this requirement.
9. Explain your past successes with interfacing your solution to other Higher Ed systems both hosted on and off premises. JSU may allow for a separate repository of data that can be interfaced with the solution. Explain what you offer as well as what hardware/storage considerations are needed.
10. Does the solution offer a two-way interface with the SIS? Please describe.
11. JSU requires that the solution allow for real-time and/or batch data transfers to other JSU systems via an API and/or developers toolkit for use by JSU's IT staff. Describe how you deliver this solution.
12. Explain how your solution distributes volumes of outbound email with merged data and personalization.
13. What mobile platforms are supported? How are mobile capabilities implemented? How are new mobile capabilities developed and by whom?
14. Identify which components of your solution are provided by 3<sup>rd</sup> parties. This includes OEM software, hosting, et al.
15. How often is the software updated and releases made available? What is the lag time between new releases of software and updates of the documentation? JSU

requires updates and releases issued by the vendor within the first year to be included at no cost.

16. Who is responsible for installing patches, updates and releases?
17. Is the proposed solution built on a single code base? If not, describe the various proposed solutions?
18. Provide a task list/timeline for the solution's implementation at JSU. Our anticipated implementation date is July 1, 2023.
19. Define support and maintenance provided including phone and web support.
20. Describe your best practice consulting options.
21. Define how many languages the solution supports and whether the solution contains the flexibility to create user-defined fields when required.
22. JSU requires the ability to manually and/or automatically purge and/or archive records based on JSU's business rules and policies. Please detail your manual and automatic processes for purging and archiving, storage capacity limits and future access of archived records.

### **Access, Permissions and Security Requirements**

23. Please explain how access is granted into the solution.
  - a. JSU requires the ability to maintain a complex departmental mapping for defining roles and permissions within the system.
  - b. Please describe your authentication methods.
24. JSU requires that system functions are able to be secured at various levels to be determined by an administrator. Please explain how permissions are established and controlled within the system.
25. JSU requires that the system be securely accessible by staff remotely.
26. Please provide details of your policies on data loss prevention. What is the recovery process? Does the solution include intrusion protection procedures?
27. Please detail how your solution ensures a secure transmission of data.
28. This solution will house sensitive personal identification information such as names, addresses, social security numbers, etc. Please detail what functionalities are in place to ensure this data is protected.

### **Communication, Calendar, & Travel Management Requirements**

29. We require the solution to facilitate individualized communications to targeted audiences. Additionally, the system will facilitate internal communications between JSU departments. This includes effectively handling and managing multiple channels of communication for recruitment, admissions, enrollment, communications, marketing, reporting and comparative analysis. Communication channels may include but are not limited to chat, inbound/outbound emails, letters, inbound/outbound phone calls, web, fax, etc.
30. The solution should allow JSU the ability to compile custom data loads from a variety of sources. The solution should support and handle the business rules of relevant departments. We require the solution to provide tools that will allow JSU

to achieve lead scoring and qualifying using customizable variables. Please describe the capacity your solution has available for lead qualifications.

31. The solution should provide calendar and events management for JSU users like those in Enrollment Management. This calendar should be editable as necessary as it fluctuates frequently due to engagement opportunities often being introduced by invitation which may not be on the planned annual schedule.
32. In addition, the solution should entail a Travel Management functionality for Enrollment Management events whether in Recruiting or Financial Aid Literacy events that are held in various locations. This functionality should have the ability to document travel activities, details, expenses and results. Describe how your solution will meet this requirement.

### **Additional Features and Functionality**

Jackson State University acknowledges that the specifications within this RFP are not exhaustive. Rather, they reflect the known requirements that must be met by the proposed system. Vendors **MUST** specify in their proposal what additional components may be needed to complete each configuration.

33. JSU would like details about additional specific features/functionality that your solution might offer for Recruitment, Admissions, and/or assisting students to successfully complete their degree efficiently and expeditiously.

### **DELIVERABLES**

JSU's anticipated implementation is July 1, 2023. If Vendor is unable to meet this timeframe, the Vendor **MUST** describe the best possible delivery schedule. The delivery schedule will be scored based on the Vendor's ability to meet the anticipated implementation time as closely as possible.

**Warranty Conditions:** All equipment and services shall include manufacturer's minimum standard warranty unless otherwise agreed to in writing. Vendor shall be an authorized dealer, distributor or manufacturer for all products. All equipment proposed shall be new and not priced or labeled as pre-owned, reconditioned or retired.

### **Pricing**

JSU intends to enter a contract for one year with the option to renew for three additional years. Vendor should include in their proposal a separate cost per year for years one, two, three and four.

\*NOTE\* Pricing should encompass the entire solution pricing along with any services and necessary customizations. Additional components or modules not included in the offering must be identified/itemized as "optional" and include all software costs,

maintenance/support costs, hosting services costs, professional services and or customization/integration costs/estimates as applicable.

**Additional Requirements – INCLUDE WITH TECHNICAL & COST SPECIFICATIONS RESPONSE**

- Contractor shall agree to indemnify the University from any claims, actions, suits, causes of action, or demands, which may include, but is not limited to court costs and legal fees, arising from the implementation of the services to be provided.
- In event of default by Contractor or termination of contract, Contractor shall agree to provide service on a month-to-month basis at existing rates for up to six months.
- There shall be no cost increase during the initial term. A cost increase may be considered at the beginning of each renewal term. In this RFP's response, the proposer must provide the justification and methodology for applying the cost increase and indicate the proposed amount of cost increase.
- JSU reserves the right to reject any or all proposals received, to waive any informalities or irregularities in proposals received, or to accept any proposal which is deemed most favorable to the University.
- Terms and conditions that constitute grounds for termination will be specified in the contract. JSU reserves the right to terminate contract with sixty (60) days' notice or at the time of the contract renewal.

**Insurance Requirements**

Contractor, upon award, but prior to any work commencing, shall provide certificates of insurance coverage as outlined below.

- Contractor shall provide proof of Comprehensive General Liability insurance. The Contractor shall provide a Certificate of Coverage mailed to the Board of Trustees of State Institutions of Higher Learning, Office of Insurance & Risk Management, 3825 Ridgewood Road, Suite 429, Jackson, MS, 39211 **AND** to JSU, Division of Information Technology, 1400 John R. Lynch St., Jackson, MS 39217 at least ten (10) business days prior to start of services. The Certificate of Coverage should, at a minimum, contain the name of the carrier, effective and expiration dates of coverage, a description of the covered perils, and amount of coverage by peril, the name and mailing address of the insurance company, and the name and mailing address of the insurance agent. The Certificate of Coverage must name the Board of Trustees of MS State Institutions of Higher Learning and JSU as additional insureds. The additional insured requirement shall be by an endorsement form, or an equivalent or broader form, or by blanket additional insured endorsement, and the general liability coverage shall be primary and noncontributory in respect to insurance maintained by JSU or IHL. Further, Contractor agrees to waive any rights of subrogation against IHL or JSU. The Comprehensive General Liability coverage shall be a minimum amount of Five Million Dollars (\$5,000,000) per occurrence and Five Million Dollars (\$5,000,000) annual aggregate through an



insurance company with a Best rating of A- or higher and a financial size Class X or higher approved by the Mississippi Department of Insurance. No material change in coverages may occur for JSU or IHL without 30 days advanced notice.

- Worker's Compensation and Employer's Liability: Standard limits as required by applicable Worker's Compensation Laws.
- Comprehensive General Liability:
  - i. General Aggregate - \$5,000,000
  - ii. Personal & Adv Injury - \$5,000,000
  - iii. Each Occurrence - \$5,000,000

Certificates of insurance with coverage described above shall be furnished by the Contractor prior to the commencement of services and such certificates shall provide that the coverages will not be canceled or reduced in amount prior to 30 days after notice of such cancellation has been mailed to the Purchaser. Certificates shall be endorsed to include a waiver of subrogation in favor of Jackson State University and that Contractor hereby waives all rights of recourse, including any right to which another may be subrogated, against Jackson State University for personal injury, including death, and property damage.

### **MANAGEMENT REQUIREMENTS** *(Submit separately from Technical and Cost)*

JSU seeks a vendor with demonstrated experience with current clients using functional Higher Education CRM Solutions that are interfaced with Student Information Systems (SIS). The vendor will have proven success with Higher Education CRM project management, consulting and leadership experience, responsive technical support and stability in the marketplace.

**The questions below are designed to allow JSU to further evaluate vendor qualifications:**

34. What year was your company started?
35. How many years has your company been in the business of performing the services called for in this RFP?
36. Please provide the physical location and mailing address of your company's home office, principal place of business, and place of incorporation.
37. If your company is not physically located in the region, how will you supply professional services?
38. List all licenses, permits or certifications your company possesses that are applicable to performing the services required in this RFP.
39. For how many customers has your company provided these services in the past two (2) years?
40. Please provide a list of three current client references that have implemented your solution and are utilizing your services who we may contact as references. These client references must be similar in size or larger than JSU and receive a similar solution as we are seeking.
41. Describe any specific services which your company offers along with any specialized experience, certification, and/or education of your current staff.

42. Is your company currently for sale or involved in any transaction to expand or to become acquired by another business entity? If yes, please discuss the impact both in organizational and directional terms.
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## **INQUIRIES ABOUT RFP**

Prospective Respondents may make written inquiries concerning this Request for Proposal to obtain clarification. Responses to these inquiries will be by addendum to the Request for Proposal (RFP). The deadline for inquiries shall be March 8, 2023 at 5 p.m. Please send your inquiries to [laura.r.furdge@jsums.edu](mailto:laura.r.furdge@jsums.edu) and copy all alternative contacts listed on page 1 of this document.

## **SCHEDULE OF CRITICAL DATES**

The following dates are for planning purposes only. Unless otherwise stated in this RFP, progress towards their completion is at the sole discretion of JSU.

I.	RFP Posted	FEBRUARY 15, 2023
II.	Prospective Respondents written inquiries deadline	MARCH 8, 2023
III.	Responses to inquiries posted	MARCH 15, 2023
IV.	Proposal submission deadline – 11:00 A.M.	APRIL 5, 2023
V.	Award determination date (estimated target)	MAY 1, 2023
VI.	Contract signed (estimated target)	JUNE 1, 2023
VII.	Implementation Date	JULY 1, 2023

## **WRITTEN OR ORAL DISCUSSIONS/PRESENTATIONS**

After the opening of all offers received by the closing time and date for accepting offers, Respondents may be required, at the request of JSU, to make a public oral presentation or provide written clarifications to their proposals. Oral presentations may be recorded. Any oral presentation or written clarification given by Respondent will be considered part of the RFP's response. Personnel in JSU's Office of Purchasing and Travel will schedule any such presentations or address any needed written clarifications. JSU reserves the right to request a "best and final offer" at its discretion.

## **EVALUATION OF PROPOSALS**

JSU reserves the right to conduct discussions with any or all Respondents, or to make an award of a contract without such discussions based only on evaluation of the written proposals. JSU reserves the right to contact and interview any reference listed. JSU may

make a written determination showing the basis upon which the award was made and such determination shall be included in the Procurement file.

JSU reserves the right to award this contract in whole or in part depending on what is in the best interest of JSU with JSU being the sole judge thereof.

The evaluation factors set forth in this section are described as follows:

- Vendor's ability to deliver products and services meeting the overall objective and functions described in this RFP, including by the target start date
- Competitive fees
- Availability and access to technical support
- Vendor's experience
- Compliance with applicable State and Federal laws and regulations
- The committee may invite finalists for interviews and/or presentations. Failure to participate may result in a proposal not being considered.

Proposals will be scored based on the following weights (100 points total):

- SOLUTION DESIGN, END USER FUNCTIONALITY & SCHEDULE FOR OPTIMIZATION – 25 points
- CUSTOMER SERVICE & TECHNICAL SUPPORT – 8 points
- TECHNICAL CAPABILITIES & REQUIREMENTS – 25 points
- COST – 42 points

## **TWO-PHASE, BEST AND FINAL OFFER**

If the initial proposals do not provide JSU with a clear and convincing solution, or if JSU feels it is appropriate to offer the potential providers an opportunity to submit revised proposals, JSU reserves the right to use a two-phase approach and/or invite Best and Final Offers (BAFO). Based on the information obtained through the proposal submissions (Phase-One), JSU may choose a specific business model, and potential providers may be asked to submit revised proposals based upon that specific model.

The evaluation committee may develop, for distribution to the top-ranked firms, refined written terms with specific information on what is being requested as a result of information obtained through the initial RFP process. Proposers may be asked to reduce cost or provide additional clarification to specific sections of the RFP. Selected proposers are not required to submit a BAFO and may submit a written response notifying the solicitation evaluation committee that their response remains as originally submitted.

## **TERM OF CONTRACT**

JSU intends to enter a contract for one year with the option to renew for three additional years. JSU reserves the right to terminate this agreement with thirty (30) days' notice, by the Vice President for Business and Finance via certified mail to the address listed on the signature page of this RFP (Appendix A) if any of the terms of the proposal and/or contract are violated.

In the event the Contractor fails to carry out and comply with any of the conditions and agreements to be performed under the specification, JSU will notify the Contractor, in writing, of such failure or default. In the event the necessary corrective action has not been completed within a ten (10) day period, the Contractor must submit, in writing, why such corrective action has not been performed. The University reserves the right to determine whether or not such noncompliance may be construed as a failure of performance of the Contractor.

Termination of contract by Contractor without cause can only occur with at least one-hundred and twenty (120) days' notice prior to the proposed termination of the contract.

In the event JSU employs attorneys or incurs other expenses it considers necessary to protect or enforce its rights under this RFP's contract, the Contractor agrees to pay the attorney's fees and expenses so incurred by JSU.

## **ACCEPTANCE TIME**

Proposal shall be valid for one-hundred eighty (180) days following the proposal due date.

## **RFP CANCELLATION**

This RFP in no manner obligates JSU to the eventual purchase of any services described, implied or which may be proposed until confirmed by a written contract. Progress towards this end is solely at the discretion of JSU and may be terminated without penalty or obligations at any time prior to the signing of a contract. JSU reserves the right to cancel this RFP at any time, for any reason, and to reject any or all proposals or any parts thereof.

## **OTHER CONTRACT REQUIREMENTS**

**Award Terms:** This contract shall be awarded at the discretion of the University based on the capabilities and overall reputation of the Contractor, as well as the cost. Acceptance shall be confirmed by the issuance of a contract from JSU.

**Standard Contract:** The awarded Contractor will be expected to enter into a contract that is in substantial compliance with JSU's standard contract. Proposal should include any

desired changes to the standard contract. It should be noted that there are many clauses which JSU can not change. Significant changes to the standard contract may be cause for rejection of a proposal.

**The Procurement Process:** The following is a general description of the process by which a firm will be selected to fulfill this Request for Proposal.

- Request for Proposals (RFP) is issued publicly.
- A deadline for written questions is set.
- Proposals will be received as set forth in the Schedule of Critical Dates.
- Unsigned proposals will not be considered.
- All proposals must be received by JSU no later than the date and time specified on the cover sheet of this RFP.
- At that date and time, the package containing the proposals from each responding firm will be opened publicly and the name of each Respondent will be announced.
- Proposal evaluation: JSU will evaluate all components of each proposal submitted.
- At their option, the evaluators may request oral presentations or discussions for the purpose of clarification or to amplify the materials presented in the proposal.
- Respondents are cautioned that this is a request for proposals, not a request to contract, and JSU reserves the unqualified right to reject any and all proposals when such rejection is deemed to be in the best interest of the University.
- The proposals will be evaluated according to criteria set forth in the Technical and Cost Specifications and Management Requirements sections of this RFP.

**APPENDIX A: SIGNATURE PAGE**

Provide information requested, affix signature and return this page with your proposal.

Name of Firm: \_\_\_\_\_

Complete Address: \_\_\_\_\_

\_\_\_\_\_

Telephone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_