LUZERNE COUNTY COMMUNITY COLLEGE
REQUEST FOR PROPOSAL
Customer Relationship Management (CRM)

Section I. INTRODUCTION

Luzerne County Community College is seeking proposals from qualified Companies/Individuals to provide a to provide a Customer Relationship Management (CRM) solution. The project involves both recruitment and retention; and the proposed solution must integrate with or replace existing systems (see Section IV - Scope of Services for details). This document is a Request for Proposal (RFP) for the services described below and does not obligate LCCC to accept responses from eligible Companies/Individuals. The RFP establishes minimum requirements a Company/Individual must meet in order to be eligible for consideration as well as information to be included in the Company's/Individual's proposal.

Carefully examine the specifications, conditions, and limitations. The selection of the successful Company/Individual will be made based on LCCC's evaluation and determination of the relative ability of each Company/Individual to deliver quality service in a cost-effective manner. The following specific criteria will be evaluated and must be addressed in the proposal:

1 Company/Individual History and Organization
2 Cost Proposal and Invoicing
3 Insurances
4 References

LCCC is not obligated to accept the lowest proposal and reserves the right to reject any and all proposals or amend the scope of the project. All of the Companies/Individuals must be duly licensed or otherwise have the ability to perform work in accordance with all governing local authorities and to the satisfaction of those authorities.

Notice of the Purchasing and Conflict of Interest Policies in place at Luzerne County Community College ("LCCC"):

Each owner/operator/individual/officer submitting a proposal or for whom a proposal is being submitted on behalf of the owner (each being referred to as a "Provider") to LCCC certifies that he/she/they are not a spouse, child, parent, brother/sister (each being referred to as an "Immediate Family Member") of any LCCC employee or Board of Trustee member at LCCC who owns more than a one (1%) percent ownership interest in the Provider/Provider's business.

If the Provider is an Immediate Family Member, according to College Policy and Procedure, disclosure must be made, and LCCC may decline entering into a business relationship with the Provider. Disclosure shall be made in writing at the time of submitting the proposal to the Director of Purchasing.

Violations of any of the policies or procedures may result in rejection of the proposal. Additionally, LCCC may have the right to recover damages suffered by LCCC in obtaining an alternative proposal, which damages may include, but are not limited to, consequential damages and reasonable attorney's fees.

Copies of these policies and procedures are available from LCCC upon request.

Under the Right To Know Law, the College is required to post to the PA Treasury Website all documents (BPO, PO, contract or agreement) for transactions valued at $5,000.00 and above.

Luzerne County Community College does not discriminate on the basis of race, color, national origin, sex, disability or age in its programs or activities. For a complete copy of the LCCC non-discrimination policy, contact the Human Resources Office at 800-377-5222, extension 7235. Inquiries may be directed to the Title IX Coordinator, Graceann Platukus, VP of Enrollment Management & Student Affairs, LCCC, 521 Trailblazer Drive, Nanticoke, Pennsylvania, 800-377-5222 extension 7243 (gplatukus@luzerne.edu).   Direct inquiries related to accessibility services for students to the Section 504 Coordinator, Graceann Platukus, VP of Enrollment Management & Student Affairs, LCCC, 521 Trailblazer Drive, Nanticoke, Pennsylvania, 800-377-5222 extension 7243 (gplatukus@luzerne.edu).

Section II. SUBMISSION OF PROPOSALS
Responses to this RFP are due by Noon on October 28, 2024. Late submittals will be rejected. All proposals are to be sealed, labeled with the subject of the proposal, and addressed to:
Luzerne County Community College
Purchasing Director, Mr. Len Olzinski
521 Trailblazer Drive
Nanticoke, PA 18634
Phone: 570-740-0370
The proposal submission may be mailed or delivered to the above address. Any questions regarding this RFP may be addressed to Trish Yencha, CIO, at 570-740-0412 or pyencha@luzerne.edu

Section III. CONTRACT TERM
The term of this contract shall be for a 3-year period, commencing on July 1, 2025 or thereafter, unless terminated by either party with thirty (30) days written notice.

Section IV. SCOPE OF SERVICES

1. **Project Scope**: The selected vendor will be responsible for:
   o Cloud-based CRM solution to manage student relationships and communications (emails, text, chat, and phone calls) across the entire student lifecycle including:
     - **Recruitment:**
       - Admissions Applications and Forms
       - Event Management
       - Scoring (Optional)
       - Fraudulent Application Identification Options
       - Duplicate Record Management
       - Document Management including tracking the receipt of required admissions documentation.
       - Must support test score imports.
       - Communications Management (email, text, mailings, social media, phone)
       - Campaign Management – automation of triggered communications and workflow tools.
       - Unlimited email, texting
       - Reports/Dashboards

- **Retention:**
  - Early Alerts/Risk Indicators
  - Advising
  - Appointment Scheduling
  - Communications Management (email, text, mailings, social media, phone)
  - Campaign Management – automation of triggered communications and workflow tools.*
  - Unlimited email, texting
  - Reports/Dashboards

  * Manage Accommodation Notifications (Awareness, workflow, approval, multiple stakeholders)

- **Academic Affairs CRM Support**
  - Communications Management (email, text, mailings, social media, phone)
  - Campaign Management – automation of triggered communications and workflow tools.**
  - Event Management***
  - Reports/Dashboards

  ** Manage Credit for Prior Learning (Awareness, workflow, approval, multiple stakeholders);
  Track Licensing/ Certifications Track and integrate into SIS
  Faculty notices -Students (Rosters, NA, Midterm Grades, Final Grades, etc).
  Faculty notices -Contractual (Evals, Promotions, Committee Participation, Emeritus, etc).
  Curriculum Proposals/Academic Policy Changes
  Adjunct onboarding
  Grievance Procedure
  Registration Approvals/Overrides (Variances, Change Grades, I Grades, >18 credits, etc)
  Early College, course/HS instructor hire/onboarding/evaluation
  *** Early College, HS/Faculty collaborations/convenings

- **Advancement/Foundation (Alumni Support)**
  - Communications Management
  - Campaign Management
  - Event management
  - Unlimited email, texting
  - Reports/Dashboards

- **B2B/Workforce Development CRM Support**
  - Appointment Scheduling
  - Communications Management (email, text, mailings, social media, phone)*
  - Campaign Management
  - Event management
  - Unlimited email, texting
  - Reports/Dashboards

  * Market/communicate LCCC Micro credential Offerings; Pathways, Credit for Prior Learning
  Non-credit advising

- **Integrations:**
  - Must allow options for two-way integration to existing SIS system (Ellucian Colleague)
  - Chatbot included or provide integration options to existing Chatbot (Ocelot)
  - 2-way texting included or provide integration options to existing solution (Signal Vine)
  - Options to integrate with existing LMS (Blackboard Ultra)

2. **Additional Requirements:** The proposed solution must also meet the following requirements:

- Cloud-based infrastructure with scalability and flexibility to accommodate future growth and changing business needs.
- High availability and reliability to ensure uninterrupted operations including air-gapped and immutable backups and disaster recovery strategies. Include details on how often data is backed up and how far back data can be restored.
- Data security measures compliant with industry standards and regulatory requirements including but not limited to role base security, encryption at rest and in transit, and MFA protected access. Solution must also meet FERPA, GLBA Safeguards Rule, ADA & accessibility, and PA State and Federal Requirements.
- Integration capabilities with existing systems and applications including but not limited to Ellucian Colleague and Blackboard Learn.
- SLA with agreed upon response times based upon severity/prioritization of impact.
- Single Sign On (SSO) options with MFA including M365 login integration.
- Must meet ADA compliance standards.
- Training Services – include details on all training options during and after implementation.
- Maintenance, Service, and Support – include details on all services available during and after implementation.

V. INSTRUCTIONS
Responding Companies/Individuals must address the following subjects in their proposal:

1. Company/Individual History and Organization
Provide a brief history including brief biographical information regarding the personnel who would be directly responsible for the service.

2. Cost Proposal and Invoicing
Please provide any and all subscription, licensing and Implementation fees for services detailed in Section IV. Seeking a 3-Year contract billed annually.
- **Pricing**
  - Indicate and describe all subscription and licensing model(s) for your offering.
  - Provide the base cost and pricing methodology.
  - Provide a detailed breakdown of one-time costs versus recurring costs, including implementation and integration costs - via direct integration, APIs, data imports, etc. with Ellucian Colleague (SIS), Blackboard Learn (LMS), Signal Vine (Texting), and Chatbot (Ocelot). The College currently uses TargetX for Recruitment only.
  - Is there a minimum commitment for particular usage, total volume, individual spend, or aggregate spend in order to receive the rates and terms provided in the proposal? If so, explain.
  - Provide any licensing and warranty information for third-party products you may require LCCC to purchase in support of this service.
  - Indicate the discounts available, based on volume of services and contract length.
  - Indicate any consulting support hours built into your standard contracts.
  - Indicate hourly or daily pricing for additional consulting hours we can purchase during the engagement.

3. Insurance (Companies/Contractors only, does not apply to individuals)
The successful provider shall carry and maintain, with respect to any work or service to be performed at LCCC facilities, insurance written by a responsible insurance carrier, to provide for the following:

- o Workers' Compensation as required by applicable statute and Employer's Liability Insurance.
- o Commercial General Liability Insurance in the amount of $1,000,000 listing the College as additional insured
- o Automobile Liability
- o Include a copy of Certificate of Insurance including limits with the response.

4. References

Provide at least three (3) client references whose facilities are comparable in size and profile to Luzerne County Community College. Include company name, address, contact person and contact number.

Luzerne County Community College would like thank you in advance for your interest in participating in this request for proposal. If for some reason you are unable to submit a proposal to the College, please let us know the reason why so you will remain on our active bidders list for the future.
Fax to 570-740-0525.
_____
_____

You can also e-mail your reason for non-participation to lolzinski@luzerne.edu so that we can keep it in our file.

Subject: PA Act 153 - Background Clearance Requirement

Act 153 – The Pennsylvania state legislature sought to strengthen protections for children in the PA Child Protective Services Law. The law went into effect on December 31, 2014 and now requires colleges and universities to obtain background clearances for any individual having routine interaction with children at the college or in a college-sponsored program, activity, or service. This requirement applies to college employees, volunteers, independent contractors, and students. This law requires mandatory reporting of suspected child abuse directly to the PA Department of Human Resources.

All Contractors will be required to obtain the three (3) mandatory background clearances: 1) PA Criminal Background, 2) PA Child Abuse History, and 3) FBI Cogent Clearance Fingerprinting.

These clearances must be provided for all contractor representatives/employees who will be on the campus of Luzerne County Community College to perform the work awarded. If you are unable obtain these state required background checks, you will be ineligible to perform work at the

College.

Below are the following required clearances and instructions to obtain them.

1. **Act 34 - PA Criminal Background (**On-line)

   Results are usually instantaneous. Make sure you hit "yes" to get a copy.

   Provide copy to the Human Resources Office

   https://**epatch**.state.pa.us/   Cost $22

2. **Act 151 - PA Child Abuse History** (On-line)

   Results are mailed or can be viewed and printed at the website.

   Provide the original clearance document to the Human Resources Office.

   Attached for your reference is a file which contains directions on navigating through the website.

   Google Chrome - https://www.compass.state.pa.us/cwis   Cost $8

3. **Act 114 - FBI Fingerprinting -** IdentoGO (On-line)

   Register on-line by selecting Digital Fingerprinting. Enter the Service Code 1KG756. Submit your registration number to the Human Resources Office.

   https://www.identogo.com/locations/pennsylvania   Estimated cost - $22.60