SALEM STATE UNIVERSITY

INVITATION TO BID
THIS IS NOT AN
ORDER

1. The university is an agency of the Commonwealth of Massachusetts and is exempt from any State tax or Federal excise tax
2. Unless otherwise stated, the unit price shall be the net price. Separate unit and total prices must be shown if applicable.
3. Unless otherwise stated, all quoted prices shall be FOB university address inside delivery.
   Responses must be received on or before March 13, 2019 by 3:00 pm EST. electronically to ewilson@salemstate.edu. Director of Purchasing, Purchasing Department, Salem State University, Administration Building, 2ND Floor, 352 Lafayette Street, Salem, MA 01970-5353. Electronic submissions preferred.
4. Salem State University reserves the right to waive informalities and to reject all bids; or to accept the bid deemed best for the Commonwealth
5. For additional information: Evelyn Wilson, Director of Purchasing
   Salem, MA 01970
   Phone: ___978.542.7321_____ Email: ____ewilson@salemstate.edu_____
6. Responses must be submitted to:
   Evelyn Wilson, C.P.M., Director of Purchasing
   Salem State University, 352 Lafayette Street, Administration Building, 2nd Floor, Salem MA 01970
   Phone: 978-542-7321 Email: ewilson@salemstate.edu
7. Reference: **SSU RFP 2019-07 Student Success**

SPECIFICATIONS	UNIT PRICE	TOTAL PRICE
See Attached Specifications		

EQUAL OPPORTUNITY

The contractor agrees not to discriminate against any employee or applicant for employment because of race, sex, color, religious creed, national origin, and/or ancestry. The contractor agrees to post in conspicuous places notices to be provided by the Massachusetts Commission Against Discrimination with respect to the Fair Employment Practice laws of the Commonwealth which are herein made of this contract reference.

Vendor Information

_____
COMPANY

_____
ADDRESS

_____
CITY   STATE   ZIP

_____
TELEPHONE

_____
AUTHORIZED SIGNATURE

_____
NAME   TITLE

_____

FEDERAL EMPLOYER'S ID CODE 9 DIGITs

1. **PURPOSE**

Salem State University is initiating this request for proposal (RFP) to solicit proposals from qualified Bidders to provide the university with a comprehensive student success, enrollment retention, and intervention management software system. The successful Bidder must have a proven track (current/past client list) in higher education of delivering the required services and demonstrated success in implementing the solution, and have experience with PeopleSoft and Canvas.

Salem State University desires a fully operational **go-live date of September 6, 2019**.

2. **SCOPE OF WORK**

The university seeks a comprehensive student success platform with predictive analytic functionality to help improve university retention and graduation rates. The system will be used to identify high-risk students based on defined criteria and allow university personnel to intervene with targeted relationship management and track retention/intervention outcomes. The university seeks an ADA compliant system that provides caseload management supporting student intervention processes. In addition, the university seeks solutions to increase compatibility and efficiency across institutional information systems. Provided below are the services for which the university is seeking proposals and pricing. Provide detailed explanations.

3. **FUNCTIONALITY AND OVERVIEW OF SERVICES TO BE PROVIDED**
   Each requirement contains a description and response description. A response should be given for each requirement description to be accepted.

Request Number	Requirement Description	For Requests 1 to 20, use the following scale to respond to each question: 4=Strongly Agree, 3=Agree, 2=Disagree, 1=Strongly Disagree	Response Description
1	Does the system have a student interface/portal?		
2	Does the product provide notification to students that they have been referred along with reason for referral?		
3	Does the system support caseload management?		
4	Does the system identify risk factors and patterns which contribute to student attrition?		
5	Does the system have the ability to measure student risk profile in addition to demographic criteria and academic performance?		
6	Does the software have an integrated survey capability? If so, please describe the survey functions available in the product.		
7	Does the product have the ability to export data into a spreadsheet/database for querying and reporting?		
8	Does the product allow for administrative reports such as open referrals, number of contacts, etc..?		
9	Does the system have a set of common 'canned' delivered reports?		
10	Does the system allow for user/administrator to create ad-hoc reports?		
11	Does the system have the ability to track activity with students such as: Type of contact, reason of contact, how was the contact made, etc.		
12	Is the system mobile friendly?		
13	Does the product include undergraduate and graduate students?		
14	Does the system provide notification to the referrer that the submission was received and closed? If yes, is this messaging customizable?		

Request Number	Requirement Description		
15	Does the system allow for importing of previous early alert, notes, or interactions from a previous system?		
16	Does the system allow for report permissions that match security?		
17	Does your tool integrate with our Active Directory so that university users can login with their username and password with their credentials being passed to your tool?		
18	Does the system meet all ADA (AAA) guidelines?		
19	Does the system allow for multi-channel communication methods to students?		

Request Number	Requirement Description	For Requests 21 to 71, provide detailed responses to the following questions	
21	Are communications able to be automatically and manually (ad-hoc) delivered?		
22	Describe the systems ability to track and audit student progress toward degree completion.		
23	Describe how the system supports course planning, class registration, and creation of roadmaps to graduation.		
24	Describe the system implementation.		
25	Provide year to year cost. If solutions are modular, present options of implementing all modules or modules individually. What options are excluded? If discounts are available, present all available options.		
26	The university is limited in information technology human resources, describe the "lift" required. Elaborate on the project team required and time commitment to implement your software including functional and technical resources within the university. A typical project plan would be helpful.		
27	What percentage of an FTE is required to support the tool and the process? How many person-hours per week is needed for central administration in a post-go-live, production environment? Provide a response for both non-technical and technical resources needed.		

28	The university is committed to the success of this project. The project team must be both cohesive and have complementary skill sets. Will the university have a say in the selection of the project manager and technical personnel provided by the vendor?	
29	Is software licensing based on unlimited site, concurrent, named, or tiered-user license model? Provide all options available.	
30	Describe how searches are conducted within the system.	
31	Describe how the system supports scheduling and integrates with outlook, email, and calendar	
32	Describe the ability to customize the system (school colors, field names, interface, etc.)	
33	Describe the process for setting up appointment availability.	
34	Describe the process for adding new features to the system.	
35	Describe how overlapping roles are handled (example: graduate student who is also an advisor).	
36	Describe the ability of the system to map and upload data from numerous systems	
37	Describe how photos are uploaded into the system	
38	How are students grouped or segmented into specific/targeted populations?	
39	Is it possible to attach documents to scheduled, triggered and ad hoc communications?	
40	How is an administrator/end user able to track student progress?	
41	Are there limited end user types?	
42	Provide details on system security permissions (who has access to see what).	
43	Describe the ability for anyone on campus to add a note to a student's record or indicate an interaction without that person necessarily being in that student's 'network' and without that person seeing all the notes/interactions with that student	

44	Describe the standard fields available to faculty/staff making referrals through the Early Alert system? Are they customizable? Please explain.	
45	Can students be identified in a batch by a faculty/staff member? Can bulk actions be conducted?	
46	Describe how referrals are assigned to staff.	
47	Will the university system administrator have the ability to edit notes, contacts, referrals?	
48	Will the university system administrator have the ability to proxy in as another end user?	
49	Describe the process for creating new reports	
50	Is the software hosted by the vendor or the university?	
51	If the software is externally hosted is it hosted by the vendor or within the 'cloud'? Please explain the service provider arrangement further if not being hosted by the vendor.	
52	What database is used to store the data if hosted? What are the supported database engines for the tool?	
53	How are data imported/provided to the tool out of our student records/campus management system? Via API's, secure FTP? Please elaborate on options available to load student, faculty/staff info, etc., and if API's with Oracle/PeopleSoft are available.	
54	Is the tool fully supported on both Macs and PCs?	
55	What browser types and versions are supported?	
56	Describe the system upgrade process, including frequency.	
57	Describe how the vendor deals with discontinuation of operation. What is the process and time-frame?	
58	Expand on the company's history of developing student retention/intervention tools. Also, indicate how this management system relates to core competencies of the vendor.	
59	How long has the product been used by colleges and universities?	
60	How many colleges and universities are currently using the software?	

61	What are the measurable outcomes related to student retention, (i.e., average annual percentage increase in retention after the system was operational).	
62	Expand on the profitability of the company. If public, please provide audited financials for the past two years.	
63	Is the source code for the product in a Software Escrow for the benefit of its customers in case of company failure?	
64	Please provide references of universities comparable to our size who we can talk to as part of our evaluation process.	
65	How is the software administrator notified and alerted to problems?	
66	Is there a customer portal available for clients to report issues and to obtain information via a knowledge base?	
67	What is the process for reporting issues and seeking assistance? Please describe from both university administrative and student perspectives. What are your turn-around times? Are your support hours 24/7? If not, please state times in EST time zone.	
68	What types of end user support is provided? Manuals, quick reference, tutorials, knowledge base, via phone, online, user conferences, etc.	
69	The university operates on a July to June fiscal year. Can the contract be executed before July 2019 with first payment deferred to July 2019, and renewal payments aligned to the fiscal year schedule?	
70	Will the university have a dedicated tech person provided by the vendor during implementation?	
71	Is there a feature for posting system wide announcements & notifications?	

4. EVALUATION OF PROPOSALS

All responses will be evaluated by professional staff and faculty of the university. Award of this contract shall be made to the bidder offering the best value response to the goals, specifications, and performance requirements outlined in the RFP.

5. SINGLE CONTRACTOR'S AWARD

This RFP will award a single contract to complete this project only and does not imply any further project awards from Salem State University

6. ANTICIPATED EXPENDITURES AND COMPENSATION STRUCTURES

Bidders are to detail total charges/expenditures for this project.

7. INTRUCTIONS FOR SUBMISSION OF RESPONSES

Bidders must acknowledge understanding and compliance with each section of this RFP. If the bidder's document conflicts with this RFP, the RFP's language takes priority.

This is a closed-bid submission. Bids will be opened and examined according to the time table set forth in section 8. Bidders will not have the opportunity to amend bids once they are submitted. If a bid is not complete, it will not be accepted. Further, if the contract is awarded and then discovered to be incomplete, that award will be rescinded.

Bids must be submitted BEFORE the posted deadline and will not be accepted after. Bidders will submit one (1) copy bid (electronic submissions **not** submitted through Comm-Pass will be in Microsoft Word or PDF format).

Any bid that does not specifically address the RFP will not be considered a valid bid-response.

8. TIMETABLE

Please note that this is an anticipated calendar and may be subject to change.

Release of RFP	February 27, 2019
Pre-bid conference call Dial (877) 493-9553 Passcode 9007975 followed by # Questions may be submitted beforehand to Evelyn Wilson at ewilson@salemstate.edu. Minutes will be sent out as an addendum to the RFP.	March 6, 2019 at 12 pm EST
Response due date	**March 13, 2019 by 3pm EST**
Selected vendors invited to campus to introduce their product/review proposal (if necessary)	Week of March 18, 2019
RFP Anticipated Award	Anticipated week of March 25, 2019
Contract Offer	Anticipated week of March 25, 2019
Contract Signing	Anticipated March 29, 2019

9. COSTS FOR PROPOSAL PREPARATION

Any costs incurred by contractors in preparing or submitting a proposal shall be the contractor's sole responsibility.

10. DISQUALIFICATION OF PROPOSALS

Salem State University reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements specified in the is RFP and which demonstrate and understanding of the scope of the work. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP shall be disqualified without further notice. A contractor shall be disqualified and the proposal automatically rejected for any one or more of the following reasons:

- The proposal shows any noncompliance with applicable law
- The proposal is conditional, incomplete, or irregular in such a way as to make the proposal indefinite or ambiguous as to its meaning.
- The proposal has any provision reserving the right to accept or reject award, or enter into a contract pursuant to an award, or provisions contrary to those required in the solicitation.
- The Contractor is debarred or suspended.
- The Contractor is in default of any prior contract or for misrepresentation.

11. ADDENDA TO THIS RFP

Salem State may need to issue one or more addenda related to this RFP. Such addenda shall be posted at the Salem State University records site: https://records.salemstate.edu/rfp. It is the sole responsibility of prospective contractors and other interested parties to familiarize themselves with the web site and visit is regularly during the RFP process for updated information or addenda related to this RFP.

12. RIGHTS RESERVED

Salem State reserves the right to award in part, to reject any and all proposals, in whole or in part, and to waive technical defects, irregularities and omissions if, in its judgment, the best interest of Salem State University will be served. Should the university determine that only one bidder is fully qualified, or that one bidder is more highly qualified than the others under consideration, a contract may be negotiated and awarded to that bidder.

13. FINAL CONTRACT

Salem State University intends to use this RFP and the successful proposal as a basis for the final contract. The winning vendor will be required to sign a Commonwealth of Massachusetts standard contract. Sample is available at: http://www.macomptroller.info/comptroller/docs/forms/contracts/standard-contract-frm.doc

14. INSPECTION OF PROPOSALS

Proposals may be available for public inspection upon notice of award and shall be available for public inspection after the contract is signed by all parties.

15. CONTRACT INVALIDATION

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

16. RFP TERMS AND CONDITIONS

The terms and conditions of Salem State University (sections A to G), specified below, should be reviewed carefully to ensure full responsiveness to the RFP. The anticipated contract will be, in form and substance, consistent with applicable policy and regulations of Salem State University and the Commonwealth of Massachusetts statutes and regulations regarding the creation and execution of such contract. The failure of any respondent to receive or examine any contract, document, form, addenda or to visit the sites and acquaint itself with conditions there-existing, will not relieve it of any obligation with respect to its proposal or any executed contract. The submission of a proposal shall be conclusive evidence and understanding of the Salem State University's intent to incorporate such terms and conditions into the contract.

A. PURCHASE TERMS
   Where a term or condition contained in this RFP differs from a term or condition set forth in the state contract, the terms or the conditions of the state contract shall prevail.

B. ADDITIONAL TERMS AND CONDITIONS

   No additional terms and conditions included with the proposal response shall be evaluated or considered and all such additional terms and conditions shall have no force and effect and are inapplicable to this proposal.

   1. The initial evaluation period will occur six months in the agreement. The selected vendor's work will then be evaluated every three months thereafter.
   2. Customer Payment and Privacy Protection Conditions – responses should certify compliance and/or company policies and procedures regarding the following:
      a. "Red Flag Rules" – effective November 1, 2009, any third-party vendor of the university that handles, stores, or transmits personal identifying information must comply with federal trade Commission's Red Flag Rules. Please identify your company's Red Flag Administrator and policies related to this regulation.

   Please note: any submission that does not address these conditions will be deemed to be incomplete and subject to disqualification from consideration.

C. PRICING

   Quoted pricing shall remain firm for the entire term of the negotiated contract.

D. CONTRACT TERMINATION
   If the contractor persistently disregards the laws, ordinances, rules, regulations or orders of any authority having jurisdiction, or otherwise is in substantial violation of a provision of the contract documents, or the university deems the services provided to be unsatisfactory, then the university may, without prejudice to any right or remedy and after given the carrier thirty (30) days written notice, terminate the employment of the carrier.

   The university shall be obligated only for those services rendered and accepted prior to the date of Notice of Terminations.

E. CONTRACT RENEWAL

The contract may be renewed upon the same terms and conditions, provided that the parties agree on pricing terms. The vendor shall not later than thirty (30) days before the expiration of the contract provide written notice of its intent not to renew the contract or of any changes to pricing it may require.

F. EMPLOYEES

All workers performing services shall be employees of the contractor and shall not, under any circumstances, be considered employees of Salem State University. Contractor shall provide, and be responsible for, all required services and benefits with respect to its employees, including but not limited to worker's compensation and unemployment insurance.

17. **EQUAL EMPLOYMENT OPPORTUNITIES REQUIREMENTS**

In entering into any contract resulting from this RFP the contractor agrees not to discriminate against any employees or applicant for employment because of race, sex, color, religious creed, national origin, and/or ancestry. The contractor agrees to post in conspicuous places notices to be provided by the Massachusetts Commission Against Discrimination with respect to the Fair Employment Practice laws of the Commonwealth which are herein made of this contract reference.

18. **Duration of Contract**

The contract shall be for a period of three years beginning April 1, 2019 and concluding on March 31, 2022 with the option to extend for three (3) one (one) year extensions.