RFP # 2016-001
REQUEST FOR PROPOSAL – Student Information System (SIS)
PART 1
INTRODUCTION

1.1 Purpose of Request for Proposal

This RFP is intended to facilitate the purchase, installation, and maintenance of a Student Information System (SIS) software to manage and track all contacts and processes related to recruitment and admissions for Coastal Bend College, which includes its main campus in Beeville, Tx and three outlying campuses in Alice, Kingsville and Pleasanton, Tx, and referred to as “the College” in this RFP, in accordance with all requirements stated.

1.2 Organization of RFP

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The Terms and Conditions should be reviewed very carefully to insure full responses to the proposal. If you are unable to fully comply with the Terms and Conditions, any deviation must be clearly indicated. Failure to meet the Terms of the RFP may result in the proposal being considered non-responsive; however the College reserves the right to waive those discrepancies that are considered non-essential by the Proposal Evaluation Team.

1.3 Schedule

<table>
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<tr>
<td>April 21, 2016</td>
<td>Issue Request for Proposal</td>
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<td>May 20, 2016</td>
<td>Insurance Coverage Requirement and Intent to Participate due</td>
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<tr>
<td>June 30, 2016</td>
<td>Proposal due to Business Office</td>
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<td>July 1 - 15, 2016</td>
<td>Evaluation and vendor presentations</td>
</tr>
<tr>
<td>August, 2016</td>
<td>Anticipated notice of award</td>
</tr>
<tr>
<td>August, 2016</td>
<td>Contract signed</td>
</tr>
<tr>
<td>September, 2016</td>
<td>Purchase order issued and work commences</td>
</tr>
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These dates are approximate and are subject to change by the College until the completion of successful contract negotiations and the existence of a signed agreement between the parties.
1.4 Inquiries
All inquiries about this RFP should be directed to Dela Castillo, Executive Director of Business Services, in writing or e-mail. Email address is dcastillo@coastalbend.edu. Email is preferred. No vendor contact will be made with any College personnel without the prior permission of Dela Castillo, Executive Director of Business Services.

1.5 Inclement Weather and Other Unanticipated University Closings
In the event that the College is closed as a result of inclement weather or for other unanticipated reasons, proposals will be due on the next day that the College is officially open, at the same time. In the event that the College has a delayed opening on the date that the proposal is due, the proposal date and time will not change. Information regarding the College’s closings or delayed openings may be obtained by checking the College website at www.coastalbend.edu.

End of Section I

PART II
PROPOSAL REQUIREMENTS

2.1 Submission of Proposals and Inquiries

2.1.1 One hard copy, marked as “Original”, one electronic copy, and 3 copies of all proposals must be received no later than 4:30 p.m. (CDT) on June 30, 2016, to the College Business Office, and may be either mailed or hand carried to the following address:

Coastal Bend College
ATTN: Dela Castillo
Executive Director of Business Services
Business Office, Robert J Beasley, Jr. Administration Building
3800 Charco Rd
Beeville, Texas 78102

The container of the proposals must be labeled with the name of the Respondent Company as well as the title of the RFP (RFP #2016-001 Student Information System)

Proposals, modifications, or withdrawals received after the date and time set for receipt of proposals may not be considered.
2.1.2 The title of the RFP and the name of the respondent should appear on a cover page with the proposal.

2.1.3 The Vendor references should be a part of the Proposal submission. The references should include five references for Texas Colleges and/or Universities and must include the contact name and phone number.

2.1.4 Should your company decide not to submit a proposal, you are requested to notify Dela Castillo, Executive Director of Business Services.

2.2 Proposal Format

Proposals shall be submitted using the following format to facilitate direct comparison. Failure to follow this format may result in the proposal being considered non-responsive. Proposals shall include in the order specified:

2.2.1 Cover Letter

The transmittal letter must contain the following information:
- Name and address of the company submitting the proposal
- Name, address and telephone number of the individual(s) to contact, and who shall be authorized to negotiate and bind the company to all commitments made in the proposal.
- A summary of the Vendor’s ability to perform the services described

2.2.2 Executive summary describing a summary of the proposed solution that reflects your understanding of both the College’s needs and how your solution will satisfy those needs. Include enough detail to demonstrate your understanding of the current environment and scope of the project.

2.2.3 Proposer qualifications providing background and current operations information on the company including: company history, size of the company, management structure (organization chart), locations/offices and experience with the proposed system and a minimum of five educational references. Along with the name of the Project Manager, resume, and the amount of time he/she will be at the College during installation of the system.

2.2.4 A detailed proposal including proposed method of providing equipment and services detailed herein. Proposals should be prepared simply and economically, providing description of the capabilities to satisfy the requirements of this RFP. Vendor should describe in detail how the proposed system meets each requirement listed in the section titled coastalbend.edu
Section III Scope of Work/Specifications of this RFP. Proposals should include, but not be limited to, the exact specifications section. Vendor’s response should follow the outline used in this RFP including section numbers.

2.2.5 The price proposal must include the cost of the system, required hardware, all installation/consultation costs associated with implementation, system documentation, training costs and any ongoing costs after implementation such as annual hosting fees (if appropriate), and annual license and/or maintenance fees. Each price proposal should reflect projected costs for each category throughout the term of the contract.

Once a contract is agreed upon, the College will NOT pay any additional charges, with the exception of late payment charges if applicable, during the duration of this contract unless approved via a written Change Order.

2.2.6 Support Services
- Manufacturer’s Support Statement for each type of product proposed
- Proposer’s SLA Guarantee
- Description of training provided including all available levels of training by application, cost, time frame, etc. This should include brief course outlines. The proposal should also describe the availability of any user support groups, conferences, listserv, etc. that are established in association with their application(s) for ongoing training once implementation has been completed, as well as the availability of any self-paced training. The proposal should also describe training as part of the overall on-going service agreement as well as support after installation.

2.2.7 Any exception to the Terms and Conditions of the Request for Proposal. Refer to Section 4. If no exceptions are presented with your proposal, the assumption will be made that all stated terms and conditions will be incorporated into the final contract.

2.2.8 An authorized official of the company must sign and date the proposal.
2.3 Evaluation Criteria
Proposals will be evaluated by an evaluation panel on the basis of the following criteria listed in order of importance.

A. Product’s ability to meet functional requirements
B. Cost Factor (Total for 3 years)
C. Technical Configuration and Requirements
D. Ease of Integration
E. Implementation Plan
F. Service and Maintenance Coverage
G. Proposer’s experience with Texas Colleges and Universities

The evaluation process will take place in two phases. Based on the evaluation of the above criteria, up to the top three vendors, may be further evaluated via presentations/demonstrations. The College will notify vendors as quickly as possible to schedule specific times. Upon completion of the presentations/demonstrations, one company will be contacted to enter into negotiations for a contract.

2.4 Live Demonstration
Up to the top three companies, based on the initial evaluation by the Evaluation Committee, may be invited to give a live demonstration of their proposal to clarify or verify the contents and the representations made in the response. The presentation will be made “in person” or online at Coastal Bend College, and any travel expenses incurred by the Vendor are the sole responsibility of the Vendor.

2.4.1 The live demonstration should be conducted in a straightforward manner in order to secure a clear and meaningful understanding of the Vendor’s proposed system.

2.4.2 The live demonstration is designed to satisfy the evaluation committee’s need for clarification and understanding of the information that was provided in the Vendor’s written proposal.

2.4.3 The live demonstration should be limited in scope to the project only, with clarification as to add-on services with applicable pricing.

2.5 Proposal Rejection and Award of Contract

2.5.1 A contract will be awarded to that respondent whose proposal is determined by the College to be the most advantageous to and in the interest of Coastal Bend College.

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best interest of the College based on a best value evaluation process using the criteria stated above.

2.5.2 Notwithstanding any other provision of the RFP, the College expressly reserves the right to:

- Waive any defect or informality in any proposal
- Reject any or all proposals
- Cancel the RFP
- Reissue a request for proposal
- Negotiate with any or all the vendor representatives for the purpose of obtaining the best and final offer.

2.5.3 No binding contract shall exist between the College and the selected vendor(s) until a purchase order is issued by the College. This purchase order shall be governed by all applicable specifications and terms and conditions contained in this RFP and the proposal submitted by the selected vendor, as negotiated. Therefore, it is to the advantage of the vendor(s) that the proposal be submitted initially on the most favorable, yet realistic terms, which they can furnish the College.

2.5.4 Respondent shall certify in its cover letter that it will enter good faith negotiations with the College if selected for potential award of a contract pursuant to its response to this RFP. If negotiations do not result in a mutually acceptable document or lack of progress toward that end is evident, the College may terminate all discussions with that respondent and enter into negotiations with the next ranked respondent. The College reserves the right to enter contract negotiations with any vendor it deems responsible and responsive.

2.6 Modification of Proposals
The respondent(s) may modify proposals at any time if mailed or hand carried so as to arrive on or before the time and date set for receipt of the proposals.

2.7 Withdrawal of Proposals
Proposals may be withdrawn by written notice received by Coastal Bend College prior to the time and date set for receipt of the proposals.

2.8 Validity of Proposals
Respondent(s) shall certify that proposals submitted in response to this RFP shall be valid for ninety (90) days from date of proposal. However, pricing stated in the proposal must remain firm throughout the term of the contract once accepted.
2.9 Proposal Preparation Costs  
The College is not liable for any expense incurred by respondents in the preparation of responses to this RFP.

2.10 Guarantees and Warranties  
All guarantees and warranties should be stated in writing and submitted as part of the proposal.

2.11 Publicity  
The respondent(s) shall make no announcement concerning the negotiation or awarding of a contract as a result of this RFP without the prior written approval of the President of the College or the President's appointed representative. Additionally, the selected respondent shall not use in its external advertising, marketing programs, or other promotional efforts any date, pictures, or other representation of Coastal Bend College without prior written authorization of the Business Office.

2.12 Insurance  
The selected respondent must have insurance in full force and effect during the term of the proposal contract. See Appendix A for specified requirements. This form must be returned with your proposal.

End of Section II

Part III. PROPOSAL SCOPE  
The College seeks a Student Information System (SIS) solution to better manage communication and interaction with prospective students, inquiries and applicants. This solution will facilitate stronger relationships with prospective students from the prospect to the matriculation stage. The College requires automated systems which enhance outreach efforts and improve personalized relationships with prospective students, parents, schools and other stakeholders.

3.1 Current Technical Environment  
A critical part of the selection of any vendor will be the ability of that vendor to integrate with our current technical environment. Regardless of whether the CRM chosen is hosted in-house or in a cloud environment, it must meet the requirements of having an SQL database backend and integrate, or at least be interoperable, with POISE (Jenzabar PX) (the master source of records).
3.1.1 Current System
HP Integrity RX2800 i2
RX2800 i2 Itanium 9340
8 Gig Ram
2 X 146 Gig Hard Drive
4 X 400 Gig SSD Hard Drive
DVD-Rom Drive
External Tape Drive

3.1.2 Enterprise Architecture –
The new CRM, if hosted onsite, must be able to meet our system configuration as follows:

Supermicro Server or equivalent
64 Gig Ram
3.6 TB (8 X 600 Gig SSD Drives with 2 as spare drives)
Windows Server 2012 R2
Tape Backup system or equivalent

3.1.3 Other Systems –
Vendors must discuss how their products can be integrated with the following to deliver automated, bi-directional data exchanges and provide the ability to schedule integration jobs at desired times.

a) Blackboard / Canvas (Learning Management System)
   a. Students: SIS must be able to integrate with our LMS.
      i. As student records are added to the SIS database they are automatically added to the LMS database.
      ii. As student records are deleted from the SIS database they are automatically deleted from the LMS database.
   b. Faculty: SIS must be able to integrate with our LMS
      i. As faculty records are added to the SIS database they are automatically added to the LMS database.
      ii. As faculty records are deleted from the SIS database they are automatically deleted from the LMS database.

b) WebExtender (Document Imaging System)
c) Speede (eTranscripts Import)
d) Texas Bookstore Company
e) Microsoft Active Directory
f) Nelnet (student payment system)
g) EdExpress/EdConnect
h) National Student Clearinghouse
   i) Zogotech
3.2 Project Scope
The scope of the project seeks a solution that meets expectations identified by the project team to include student information modules, a student web portal, course module/management, financial aid modules, continuing education modules/management, student billing modules, student life module, a learning management system, financial modules, human resources modules (including payroll), development/alumni modules, a prospect management system, an emergency communication system, and an application processing module. The system should also include and integrate with a high functioning easy to use reporting utility.

3.3 General Requirements
The proposal must provide your solution to the general requirements stated below. Please refer to the section numbers in your response:

3.3.1 General Integration
The SIS should import and export data from and to a variety of data sources and systems. The product should have sophisticated matching routines that prevent incorrect or duplicate loading of data. The SIS front end interface should be web-based and operate on Microsoft Windows and Mac end-user desktop systems. Please describe in detail the file import/export capabilities and requirements (See 3.1.1-3.1.2 for specific systems that the College currently operates.)

3.3.2 Telecounseling
The product must include a telecommunications module that enables users to track, code, and add comments to individual student records. Capabilities including scheduling, scripts, histories, and lists are a priority. Calling priorities and lists must be easily compiled and generated according to selected student characteristics and/or specific enrollment objectives. Management monitoring reports such as calling effectiveness, call results, length of calls, calls made per caller in specified time period, etc., are required.

3.3.3 Web Portal
The product must be able to provide an attractive and seamless interface between the prospective student and the College’s webpage for routine prospective/admitted student functions such as requesting enrollment information and checking application status. It should allow the student to see what all documents have been received and what documents are still needed for admission and financial aid purposes. Additional functions should include ability to utilize “chat” features for prospects to communicate in real time with personnel. The portal should incorporate push and pull capability and be customizable by the student and by the College.

3.3.4 Security and Authorization
The product must also provide various levels of role-based security and authorization allowing or preventing view and update capability for certain data and forms. The system must be secure and not at risk for hacking and unauthorized access. Address security in terms of data encryption in general and handling of any financial or personal data, specifically regarding Social Security Numbers.

3.3.5 Computational Capabilities
The product should be able to accommodate scoring students based on the statistical probability that they might enroll, including calculating and storing predictive modeling scores. It should be able to compute GPA’s based on entered courses and grades, calculate predictive GPA’s based on formulas, calculate rankings and indexes based on linear regression formulas, statistical models, and correlation coefficient inputs which can be updated and amended as needed.

3.3.6 Report Capability and Ancillary Software/Hardware Products
The product should have the ability to produce standard reports and custom reports utilizing a report writer function. The vendor must provide a listing of all available reports with their proposal. In addition, the vendor must specify all ancillary software products (i.e. Crystal Reports, Microsoft Access, Adobe Acrobat, etc.) and hardware equipment that are necessary to support the system.

3.3.7 Data Management
The product should manage prospect, inquiry, applicant and admitted student data through the admissions and financial aid processes. Allowing students and CBC personnel to track which documents have been collected and which are still outstanding.

3.3.8 System Diagram
Provide a high level diagram listing the major components of the software and the hardware on which they reside when fully deployed.

3.3.9 Additional Technical Aspects
The system, including the operating system and database environments must run on industry standard, commonly used and widely supported hardware platforms and must be robust and scalable to the complex needs of the College.

3.4 Additional Questions to be Addressed
3.4.1 Provide a detailed training plan for implementation and the required time frames from each area of the College (including, but not limited to, Programmers, Admissions, Financial Aid, Business Office, Payroll, and Information Technology Services).
3.4.2 Describe the minimum and recommended software and hardware components that are required for operations of like size and complexity to Coastal Bend College.

3.4.3 What is the maximum number of concurrent users the system can handle?

3.4.4 Describe your company’s strategy and commitment to the higher education market. Include additional products and services your company provides to higher education clients.

3.4.5 How long has your product been on the market? How many total U.S. and Texas higher education clients do you have currently using the product.

3.4.6 Describe how your product is enhanced and improved. How often do you issue new releases? What are your plans for future product development? How long do you support prior releases of the software?

3.4.7 What level of skill and training is required for end-users to be able to write their own queries and ad-hoc reports?

3.4.8 Do you conduct regular user conferences? How often? Please provide a sample agenda and registration form for this event.

3.4.9 Describe your support for your products development community. How do you support end user efforts to expand your application?

3.4.10 Provide details of how your product supports international student prospects. Does the application support multi-language browser level enhancement?

3.4.11 Is your product flexible to allow customizations to the needs of the College?

3.4.12 Provide information on which field changes are tracked.

3.4.13 Does the product have a way to snapshot the data on census or other specific days?

3.5 Service and Maintenance
The vendor must provide an annual service and maintenance contract. A copy of the service contract should be submitted with the proposal response. The contract should stipulate the level of “help-desk” service and on-site service that will be provided and list
the costs for additional services above those thresholds. The contract should also specify any maintenance that will be provided for the system, including updates or upgrades to accommodate new product features, periodic system maintenance and guarantees should any module or software component become ineffective for its intended use.

3.6 Contract Term
The initial term of this contract will be for three years. Please disclose options for renewal beyond the contract term.

End of Section III

Part IV. TERMS AND CONDITIONS OF THE PURCHASE
Any purchase resulting from this RFP will be governed by the following Terms and Conditions.

4.1 Purchase Orders
4.1.1 All orders placed by a Coastal Bend College employee for billing to the College must be accompanied by a Coastal Bend College purchase order with a valid purchase order number.

4.1.2 The purchase order number(s) must appear on all invoices, shipping papers, packages, and all correspondence pertaining to this order. An omitted or invalid purchase order number will significantly delay payment and ultimately may result in nonpayment and/or return of merchandise.

4.1.3 To be eligible for payment, an original invoice must be submitted. Faxes and/or photocopies are not acceptable.

4.2 Standard Terms
The standard terms of Coastal Bend College are net 30.

4.3 Invoice Pricing Differences
Shipped goods that are not priced in accordance with the purchase order are subject to return to the seller at the seller’s expense. Buyer shall not assume responsibility for good shipped under these circumstances. Any price(s) that are the direct result of quotation(s) solicited by the buyer, whether verbal or written, are firm and are not subject to change without the express permission of Coastal Bend College’s Authorized Agent.

4.4 Taxes
Unless otherwise noted, buyer is exempt from state sales and use taxes. Proper certifications will be furnished as required.
4.5 Warranty of Seller
Seller expressly warrants that all the goods and work covered by this order will conform to the specifications, drawings, samples or other description furnished or specified by buyer, and will be of good material and workmanship and free from defect. Seller also warrants that all goods covered by this order which are of Seller(s) design or are Seller’s standard product are in accordance with Seller(s) specifications, and are fit and sufficient for the purpose intended.

4.6 Confidentiality
Vendor shall, and shall ensure that all of its employees and agents involved with the performance of the Services, keep confidential any proprietary, trade secret, business secret, copyright, patent or other such information of Coastal Bend College, or of any of its vendors, suppliers, or constituents, which it learns as the result of carrying out its obligations under this Agreement, unless specifically directed by the College to release the information. Vendor expressly further agrees that it shall return any such information and copies thereof to the College upon completion of Vendor's duties under this Agreement, or upon the College’s request. The terms of this Section shall survive the termination of this Agreement.

Public Information Act
Documentation and other material submitted in connection with this request for proposals or any resulting contract may be subject to public disclosure pursuant to Chapter 552 of the Texas Government Code (the "Public Information Act").

If a Vendor believes that its response, or parts of its response, may be exempted from disclosure under Texas law, the Vendor must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, the Vendor must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s). The determination of whether information is confidential and not subject to disclosure under the Public Information Act is the duty of the Office of Attorney General (OAG). The College must provide the OAG sufficient information to render an opinion and therefore, vague and general claims to confidentiality by the Vendor are not acceptable. The College shall comply with the opinions of the OAG. The College assumes no responsibility for asserting legal arguments on behalf of any Vendor.

Vendors are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.
4.7 **Indemnification**

The vendor shall indemnify, hold harmless and defend the College and its trustees, administrators, faculty and employees from any liability, loss, claim, damage, expense, including attorneys' fees, injury, or death arising out of, or incident to, vendor's negligence or deliberate action. The College shall indemnify, hold harmless and defend the contractor, vendor or facility and its employees from any liability, loss, claim, damage, expense, including attorneys' fees, injury, or death arising out of, or incident to, the College's negligence or deliberate action.

4.8 **Governance and Venue of Disputes**

Disputes arising during the course of any agreement reached as a result of this proposal shall be governed by the laws of the State of Texas and under the jurisdiction and venue in the courts of Bee County, Texas.

End of Section IV