



*Ambitious.*

ADMINISTRATIVE SERVICES

PURCHASING DEPARTMENT

Request for Proposal # 1001

FOR

CRM

**DATE DUE: January 19, 2024 on or before 2:00 P.M. EDT**

**SUBMIT TO:**

Dianna Pluto

Director of Purchasing

Westmoreland County Community College

145 Pavilion Lane

Youngwood, PA 15697

[plutod@westmoreland.edu](mailto:plutod@westmoreland.edu)

Contact Information:

724-925-4185

[plutod@westmoreland.edu](mailto:plutod@westmoreland.edu)

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**1: Key Information Summary**

Title of RFP: CRM for Westmoreland County Community College, RFP# 10001

RFP Issue Date:

Purpose: Westmoreland County Community College wishes to acquire and implement a comprehensive CRM that will streamline the marketing, recruitment, retention, early alert and engagement processes by providing a centralized platform for marketing, recruitment, student support, and data analytics

Procurement Method: Invited competitive sealed proposals

Contract Term: The College anticipates awarding a five year contract starting in July 2024

Issuing Office: Westmoreland County Community College  
Purchasing Department

Issuing Office  
Point of Contact:

Deadline for Receipt of Proposals: January 19, 2024 at 2:00 p.m. Eastern Time

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Proposal Received at: Westmoreland County Community College  
Attn:

145 Pavilion Lane

Youngwood, PA 15697

Phone, fax or email responses **are not acceptable.**

The college will not consider or examine late responses. Amended responses will not be considered unless they are received in the Purchasing Department on or before the above date and time. The official copy must contain the complete response and related materials. A duly constituted corporate official legally capable of binding the contractor must sign responses.

**The college reserves the right to reject any or all proposals or any part thereof.**

***This RFP and all of the material contained herein are confidential and the intellectual property of the Westmoreland County Community College.***

## **2: Westmoreland County Community College**

### **2.1: Background Information**

#### **About Westmoreland County Community College**

For over 50 years, Westmoreland County Community College has served Westmoreland and surrounding counties by offering a high quality, affordable and convenient education that prepares graduates to enter the workforce or continue their education by transferring to four-year institutions. In fact, 97% of the college graduates live and work in southwestern Pennsylvania. The College mission is “to improve the quality of life for everyone we serve through education, training and cultural enrichment.”

Our vision is to provide excellent resources and services to support our students, faculty, staff and community with streamlined services designed to meet their needs and remove administrative burden to enable student success and outcomes.

Our most popular programs include health professions, general transfer studies and manufacturing technology. In addition, the culinary arts program is ranked #1 in Pennsylvania and 40<sup>th</sup> in the nation. We’re also proud to say we are ranked #1 in online programs among two-year colleges in Pennsylvania for a second-straight year.

#### **Westmoreland Fast Facts**

**Founded:** 1970

**Location:** Youngwood, Pennsylvania - approximately 6 miles south of Greensburg, off Route 119 (main campus)

**Enrollment:** Approximately 4,500 full-and part-time students

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**Programs:** 54 associate degree, 17 diploma, and 54 certificate programs with options that prepare students for careers or transfer to baccalaureate degree programs at four-year institutions.

**Degrees Granted:** Associate of arts degree, associate of fine arts degree, associate of applied science degree, diploma and certificate

**Faculty:** 70 full-time teaching faculty and approximately 194 part-time faculty

**Academic Calendar:**

- Two 15-week semesters (fall and spring)
- Two 12-week sessions (fall and spring)
- One 10-week, one 8-week and two 5-week summer sessions

Classes are conducted weekdays, evenings, Saturdays and online.

**Mascot:** Westly Wolf

**Wolfpack Athletics:** D2 in Men's and Women's Cross Country, Soccer, and Basketball, Women's Volleyball and Softball, and Men's Baseball. We also have D3 Men's and Women's Golf and Bowling.

## Accreditation

Westmoreland County Community College is accredited by the Middle States Commission on Higher Education: 3642 Market Street, Philadelphia, PA 19104, 215-662-5606, [www.msche.org](http://www.msche.org). This Commission is an accrediting agency recognized by the U.S. Secretary of Education and the Council for Higher Education Accreditation (CHEA). Programs at the college are approved by the Pennsylvania State Department of Education for veteran's educational benefits.

[View our accreditation status](#)

In addition, the following programs carry specific accreditation/approval by certifying/accreditation organizations:

- The **Baking and Pastry** program, **Culinary Arts** programs and **Food Service Management** program are accredited by the *ACF (American Culinary Federation) Accrediting Commission*, a specialized accrediting agency recognized by the Council for Higher Education Accreditation. To review our accreditation certificates, [click here](#).
- The **Dental Assisting** and the **Dental Hygiene** programs are accredited by the *Commission on Dental Accreditation of the American Dental Association*, a specialized accrediting agency recognized by the U.S. Secretary of Education and the Council for Higher Education Accreditation. To review our accreditation letter, [click here](#).
- The **Nursing** program has full approval status by the *Pennsylvania State Board of Nursing*. It is also accredited by the *Accreditation Commission for Education in Nursing*, 3343 Peachtree Road NE, Suite 850; Atlanta, Georgia 30326; Phone: (404) 975-5000. To review our accreditation, [click here](#) and visit [www.acenursing.org](http://www.acenursing.org).
- The **Medical Assisting** program is accredited by the *Commission on Accreditation of Allied Health Education Programs (CAAHEP)*, 25400 U.S. Highway 19 North, Suite 158, Clearwater, FL 33763; Phone: 727.210.2350, on recommendation of the *Curriculum Review Board of the American Association of Medical Assistants Endowment (AAMAE)*. To review our accreditation [click here](#) and visit [www.caahep.org](http://www.caahep.org).

A full description of the Westmoreland College experience can be found at [www.westmoreland.edu](http://www.westmoreland.edu).

## 2.2: Purpose of Proposal

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The College is seeking an intuitive, modern user interface that provides the ease of use and browser and device agnostic access that the College community would expect from a major commercial website (e.g., Google or Amazon). The desired solution will have reporting and analytics leading to informed decision-making throughout the College.

The purpose of this Request for Proposal (RFP) is to invite qualified vendors to submit proposals for the solution(s) described above. While creative future-looking proposals are encouraged, the new system must provide the tools needed to be responsive to increasing demands for comprehensive and user-friendly case management throughout the student lifecycle. An established vendor operating within the higher education community must lead the proposed software solution. The implementation of the chosen software systems must also fit within budget limits established by the College.

### **2.3 Current Systems Information**

The College has adopted Anthology Student, Finance, and HR solutions. Currently, Anthology Finance and HR are fully implemented with a projected Go Live date in March for Anthology-Student. Additionally, the College utilizes Modern Campus Lumens for non credit management, Brightspace D2L for a learning management system, Raiser's Edge for the Foundation, and is implementing third party software to assist with our bookstore software. The CRM selected must fully integrate with Anthology Student and Lumens. Other integrations to assist the student ecosystem are preferred so that the CRM is the system utilized for a 360 degree view of our learners.

### **2.4 Desired CRM Solution**

Westmoreland is focused on improving the effective use of technology to create an intuitive experience for their learners while easing collaboration and communication efforts through systematically integrating and uniting faculty, staff, administrators, and learners from recruitment through to completion and into their career. An overview of the ideal CRM follows:

- A comprehensive solution integrating marketing, recruitment, retention, student, and alumni activities in a single system (full life cycle) complete with reporting and analysis for decision-making. To this end, an integration with Raiser's Edge is an important aspect.
- A flexible and adaptable system with easy to create and manage workflows and triggers that enable automation across all stages of the student lifecycle based on various combinations of behaviors, demographics, activity data, and business process rules.
- Integration and synchronization with other college applications, specifically Anthology-Student, Modern Campus Lumens, Touchnet, Brightspace D2L, and Raiser's Edge.
- The ability to have applications that can easily meet the needs of all populations of the College, i.e., degree seeking students, selective noncredit students, selective credit programs, and concurrent high school students, specifically dual enrollment.
- A comprehensive early alert system
- Real time and dynamic dashboards and reporting features
- Self-service for faculty, staff, and administrators

Westmoreland's CRM must be robust and on the cutting edge of best practices within postsecondary education. The CRM must be scalable so that it can be used across noncredit and credit programs as well as by professional staff and faculty.

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**2.5 Expected Users and FTE**

The College has approximately 200 faculty, staff, and administrators who would use the CRM in different capacities, ranging from marketing to recruitment to advising. Westmoreland has roughly 4,500 credit students annually and serves roughly 10,000 students in both credit and noncredit areas annually. For admission in Fall 2023 and Fall 2022, the College received on average 3500 applications.

**3:1 Terms of RFP**

**Project Timeline**

Request for Proposal issued	11/20/2023
Acknowledgement/Intent to propose	12/15/2023
Vendors may submit preferred demonstration dates using <b>Appendix C Discovery and Demonstration Date Preference Form</b> . Must be submitted by <b>December 15, 2023 on or before 12:00 PM EST</b> by email to Dianna Pluto	11/20/2023-12/15/2023
Vendor briefing via phone <b>required</b>  <ul style="list-style-type: none"> <li>· Proposals will not be accepted from vendors who do not participate in the vendor briefing.</li> <li>· Conference call information will be provided when vendor's intent to bid email is received.</li> </ul>	12/16/2023
Vendor questions submit by email to Dianna Pluto	12/15/2023
Vendors provided responses to all questions via addendum	12/20/2023
<b>RFP responses due January 19, 2024 on or before 2:00 PM EST</b>	1/19/2024
Vendors notified if selected for demonstrations	2/1/2024
Vendor Demonstrations	2/12/2024-2/15/2024
Best & final pricing from finalist vendors	2/23/2024
Final review of vendor offerings & vendor recommendation	3/8/2024

**3.2 Contact During Procurement Process**

All communication during the procurement process, initiated by such person, firm, or entity regarding this solicitation, if same are authorized and permitted by the terms and conditions of this solicitation, shall be directed to Dianna Pluto.



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**3.3 Product Demonstrations**

Westmoreland anticipates selecting three vendors from the RFP submissions with product offerings that best meet the College's needs to demonstrate to the College Community. The demonstrations are expected to follow the scenarios outlined in the RFP to fully demonstrate the proposed solution's ability to meet the desired outcomes and experiences of Westmoreland.

Vendors are welcome to submit their demonstration date preferences by completing the table in Appendix C and emailing it to PURCHASING DIRECTOR. **Vendors may submit this form immediately and separately from the RFP response.** See above for the date when all vendors will be notified if they have been selected to demonstrate and what date they have been assigned. If the vendor chooses to complete the demonstration in person, demonstrations will occur at the Youngwood Campus, 145 Pavilion Lane, Youngwood, PA 15697. Date preferences are being gathered as input, but vendors cannot presume their preferred demonstration date will be available.

**3.4: Revisions to the RFP**

The College reserves the right to add, change or delete any part of this document during the RFP process. Any such additions, deletions or modifications to the original RFP will result in an addendum, which will become an integral part of the RFP. Any clarifications or interpretations will be given to all vendors in addendum form, and such addenda will be included as part of the proposal documents. Vendors shall acknowledge receipt of addenda in writing. Only written interpretations or corrections by means of an addendum shall be binding. The vendor shall not rely upon information given by any other method.

**3.5: Good Faith**

Each vendor is required to deal with the College in good faith with respect to the submission of their proposal and the performance of any contract awarded upon acceptance of that proposal.

The materials contained in this RFP are confidential and the intellectual property of the College. Vendors shall not discuss or communicate, directly or indirectly, with any other vendor or their agents or representatives about the preparation of the proposals. Each vendor attests that its participation in the RFP process is conducted without any collusion or fraud. If a breach of this requirement is discovered at any time, the College reserves the right to disqualify the vendor or terminate any ensuing contract. Any and all vendors participating in such discussions or communications, in breach of its obligations herein, shall be responsible for all costs and damages whatsoever that the College may incur as a result, and the College may ban such vendors from competing for contracts where such breach has resulted in an impairment of the relationship between the College and such vendors.

**3.6: Conflict of Interest**

Each vendor shall be considered to have warranted that it has not employed or retained any person, other than a bona fide employee, to solicit or secure the proposed contract; and that it has not paid or agreed to pay any person, other than a bona fide employee, any fee, commission, percentage, gift or other consideration contingent upon or resulting from the award of that proposed contract, or as an inducement to be awarded that contract. Without prejudice to

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any of its other rights, the College reserves the right to annul any contract or other arrangement entered into with a vendor where there is a breach of this warranty.

In order to protect the integrity of the procurement process, the College may reject a bid if the vendor or its employees had access to information related to the RFP solicitation that was not available to other vendors and that would, in the College's opinion, give the vendor an unfair advantage.

### **3.7: Confidentiality**

During the RFP process, the vendor may have access to private or confidential data maintained by the College. No private or confidential data collected, maintained or used in the course of this RFP process shall be disseminated by the vendor except as authorized by the College either during the period of the RFP process or thereafter. The vendor must agree to return any or all data furnished by the College promptly at the request of the College. Upon the end of the RFP process, the vendor will not use any of such data or any material derived from the data for any purpose and, where so instructed by the College, will destroy or render it unreadable.

All information shall be handled by the vendor in accordance with the Family Educational Rights and Privacy Act (FERPA) of 1974, Federal Health Care Financial Administration as defined in the Health Insurance Portability and Accountability Act (HIPAA) of 1996, and any other federal and state privacy laws applicable to the handling of faculty, staff, and student information.

Vendors should clearly identify those portions of their proposals that they deem to be confidential, proprietary information or trade secrets and provide any justification why the College should not disclose such materials, upon request. Vendors must clearly identify each and every section that is deemed to be confidential, proprietary or a trade secret—it is **not** sufficient to preface the proposal with a proprietary statement or to use a page header or footer that arbitrarily marks all pages as confidential. Any individual section of the proposal that is not labeled as confidential with an accompanying statement concerning the rationale for its claimed confidentiality shall be considered public information.

### **3.8: Staffing**

The vendor shall warrant that all persons assigned by it to the performance of any contract resulting from this proposal shall be employees of the vendor, fully qualified to perform the work required. The vendor shall include a similar provision in any contract with any subcontractor selected to perform work under that contract. Failure of the vendor to provide qualified staffing as required by the RFP specifications may result in termination of that contract and/or damages.

### **3.9: Subcontractors**

The College will accept proposals that include third-party involvement only if the vendor submitting the proposal agrees to take complete responsibility for all actions of such subcontractors. Vendors must state whether subcontractors are or are not being used, and if they are being used, must list them. The College reserves the right to approve or reject any and all subcontractors that the vendor proposes. Any subcontractors engaged after award of the contract must be pre-approved, in writing, by the College.

### **3.10: Expenses**

The College will not be responsible for any costs incurred by the vendor in preparing and submitting a proposal or in performing other activities related to this RFP.

### **3.10: Insurance**

The successful vendor will be required to procure and maintain, at the vendor's expense, during the period of agreement, the insurance described in the following subparagraphs. Insurance must be with a company or companies qualified to do business in Pennsylvania, acceptable to the College and written on the standard approved comprehensive General Liability Policy form. The vendor must furnish a certificate showing that such insurance is in effect prior to the signing of the contract award. The vendor must provide insurance coverage and furnish certificates of insurance to the College and its member institutions, on the following risks and in the following minimum limits prior to execution of an agreement:

- Commercial general liability insurance with limits not less than \$2 million per occurrence involving bodily injury and property damage.
- Comprehensive automobile liability insurance in an amount not less than \$1 million per occurrence for bodily injury and property damage combined, to cover all owned, non-owned, and hired vehicles.
- Worker's compensation insurance as required by Pennsylvania law.
- Blanket employee dishonesty bonds, with limits not less than \$1 million per loss.
- Commercial cyber liability insurance with limits not less than \$2 million per occurrence.
- Errors and Omissions insurance with limits not less than \$2 million per occurrence.
- Umbrella liability coverage must be in place and acknowledged within the contract language.

All liability insurance policies will name the Westmoreland County Community College as additional insured with respect to claims, demands, suits, judgments, costs, charges and expenses arising out of, or in connection with, any loss, damage or injury resulting from the negligence or other fault of the vendor, its agent, representatives or employees. Certificates of such insurance to be provided by the vendor shall be in terms acceptable to the College and shall contain a provision that coverage afforded under the policies will not be cancelled or materially changed until no less than 30 days' prior written notice has been given to the College. The College will not accept a limitation of liability.

The vendor shall indemnify the Westmoreland County Community College against any and all claims for injury to, or death of, any person; for loss or damage to any property; and for infringement of any copyright or patent occurring in connection with, or in any way incidental to, or arising out of the occupancy, use, service, operations, or performance of work under this contract.

The College shall not be precluded from receiving the benefits of any insurance the vendor may carry which provides for indemnification for any loss or damage to property in the vendor's custody and control, where such loss or destruction is to the College's property. The vendor shall do nothing to prejudice the College's right to recover against third parties for any loss, destruction, or damage to the College's property.

### **3.11: Indemnification**

The vendor agrees to defend, indemnify, and hold harmless the Westmoreland County Community College, its respective affiliates, contractors, officers, directors, trustee, employees and agents from and against all claims, liabilities, damages, and expenses, including attorney's and other professional's fees, arising out of or related to the intentional or negligent acts or omissions of Vendor, its affiliates, contractors, officers, directors, trustees, employees or agents.

### **3.12: Data Ownership**

All records or data input into the proposed systems remain the property of the College, without any transfer or reservation of ownership or other rights to the vendor.

### **3.13: PCI Compliance**

The College requires that the successful vendor shall at all times maintain compliance with the most current Payment Card Industry Data Security Standards (PCI DSS). As evidence of compliance, the vendor will provide when requested, a current Attestation of Compliance. The vendor acknowledges responsibility for the security of cardholder data, to the extent that they could impact the security of the customer's cardholder data, as defined within PCI DSS. The vendor acknowledges and agrees that cardholder data may only be used for completing the contracted services as described in the full text of this document, or as required by the PCI DSS, or as required by applicable law.

In the event of a breach or intrusion or otherwise unauthorized access to cardholder data stored at or for the vendor, the vendor shall immediately notify the College Solicitor to allow the proper PCI DSS compliant breach notification process to commence. The vendor shall provide appropriate payment card companies, acquiring financial institutions and their respective designees access to the vendor's facilities and all pertinent records to conduct a review of the vendor's compliance with the PCI DSS requirements.

In the event of a breach or intrusion the vendor acknowledges any/all costs related to breach or intrusion or unauthorized access to cardholder data entrusted to the vendor deemed to be the fault of the vendor shall be the liability of the vendor. The successful vendor agrees to assume responsibility for informing all such individuals in accordance with applicable law and to indemnify and hold harmless the Westmoreland County Community College, and its officers and employees from and against any claims, damages or other harm related to such breach.

*Please attest to these PCI requirements.*

### **3.14: Proposal Acceptance**

All prices, costs, terms and conditions in the proposal shall remain fixed for 180 days after the closing date for receipt of the proposal or the best and final offers are submitted. This period may be extended by written mutual agreement between the vendor and the College.

### **3.15: RFP Included in Contract**

This RFP, its appendices, and any addenda, the vendor response and any amendments or exhibits, and the letter of award for the successful vendor shall be incorporated into the written contract, which shall compose the complete understanding of the parties. Each vendor responding to this RFP will be held to have read, thoroughly examined and understood this document and its Appendices. Failure of the vendor to read, thoroughly examine and understand the RFP will not excuse any failure to comply with the requirements of the RFP or any resulting contract, nor shall such failure be a basis for claiming additional compensation.

### **3.16: Reserved Rights**

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The College reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities and to request resubmission. There is no obligation on the part of the College to award the contract to the lowest proposer. The College reserves the right to award the contract to the proposer submitting the proposal with resulting agreements most advantageous and in the best interest of the College.

Also, the members of the College reserve the right to make such an investigation as it deems necessary to determine the ability of any proposer to perform the work or service requested. Information deemed necessary to make this determination shall be provided by the proposer. Such information may include but shall not be limited to current financial statements by an independent CPA, verification of availability of personnel and past performance records.

Any member of the College reserves the right to discontinue negotiations with any selected Proposer.

The College reserves the right, without prior notice, to supplement, amend or otherwise modify this RFP.

All proposals (other than portions thereof subject to patent or copyright protection) become the property of the College and will not be returned, and the College reserves the right to utilize all such information contained in the Proposal without further cost to the College.

The College, its respective staff, representatives and any of their consultants or attorneys will not be liable for any claims for damages resulting from the solicitation, collection, review or evaluation of responses to this RFP.

### **3.17: Confidential Information**

If any proposal contains technical, financial, or other confidential information that the Proposer believes is exempt from disclosure, the Proposer must clearly label the specific portions sought to be kept confidential and specify on what the exemption is based. The College, at its sole discretion and subject to applicable law, will determine whether such exemption applies. The College has sole discretion to make such determination regarding the disclosure of information, and by responding to this RFP, Proposers waive any challenge to the College decisions in this regard. Marking all or substantially all responses as being confidential may result in the Proposer being deemed non-responsive.

Notwithstanding the foregoing, Proposers recognize and agree that the College, its staff, and its Consultants will not be responsible or liable in any way for any losses that the Proposer may suffer from the disclosure of information or materials to third parties.

### **4.0: Requirements**

Westmoreland is implementing Anthology Student and has already implemented Anthology Finance, HR, and Modern Campus Lumens. The CRM should be able to interface with these applications as well as operate within Google.

The functional and technical scenarios and questions are designed to provide the College's Steering Committee with the most realistic, scenario-based answers your firm can provide. The College is looking for a technological system that is intuitive and user-friendly; therefore, it is imperative for the Steering Committee to understand if your system has the requested

capabilities and more importantly, how users will be able to access the data, achieve the level of efficiency capable in the proposed system and the amount of effort required to operate the system.

Please note, vendors must respond to the scenarios provided in addition to the specific functional questions listed below the scenarios. **Respond only with functionality that is currently available.** You may indicate that functionality currently not available to be demonstrated will be available in a future release of the product. If future releases, include timing of that release and probability of timing to be accurate.

Explain how the proposed solution can support the processes/functional areas listed below. (If the solution has not yet been released, please define **when** it will be commercially available for production use.) If any of the following requirements are not provided in your company's solution, the proposal **is required** to include most or all those gap module functionalities by subcontract with third-party partner vendors; please describe that subcontract partnership, the partner organization, and how the solutions will be integrated.

#### 4.1: General System Questions

- What year was your company founded?
- Who owns your company and how long have you been owned by the company? If you are part of a higher education multi-system solution, please share the details of ownership and merging technologies.
- Please tell us about how your company demonstrates its commitment to the user experience.
- Please share your company's experience in working with postsecondary institutions, particularly community colleges.
- Was the CRM built using a responsive design?
- What market was your CRM originally built to serve?
- Was your CRM platform developed by your company, or another company (i.e. Microsoft, Salesforce)?
- What technologies were used to develop your CRM?
- What APIs do you provide to the applications noted above for integrations? If so, please list the applications included.
- What company do you use to host your CRM?
- What browsers does your CRM support or utilize?
- Describe how you keep our data secure both in transit and at rest?
- Was your CRM designed for accessibility on both user ends? If so, please provide the VPATS.
- What is your system uptime? What is the response time and guarantee if the system has downtime?
- When files are updated, what is the expected time for the information to be visible by other users? Are updates completed in real time or does that system have planned updates throughout the day.

#### 4.2: Prospects, Recruiting through Admissions

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Westmoreland County Community College starts its recruiting efforts through marketing. Prospective students are identified through sourced lists, social media, college events and other avenues. Once a student applies, territory managers manage each prospective student through case management. Westmoreland recruits and admits a variety of students into academic programs, including:

- Traditional and nontraditional commuting undergraduate students
- Hybrid and fully online undergraduate students
- Non-degree seeking students
- Visiting Students
- Early College High School Students
- Dual credit high school students (College in High School)
- Applicants to Certified Nursing Assistant and Police Academy Programs requiring signatures and attestations within their application
- Applicants to other selective credit and noncredit programs

As such, please address the following questions:

1. Please illustrate how an individual is classified and converted through different stages of the recruitment and enrollment funnel.
2. Are the triggers from one stage to another manual or automatic?
3. Please describe if relationships are indicated on one record or have multiple records
4. Can specific communications be sent based on the relationship? If so, please describe the process.

Students are recruited through six education centers throughout three counties in southwest Pennsylvania as well as a variety of departments at the College. Start of term and length of course dates vary by program and course. Students are driven from marketing and communications via social media, direct marketing, events, etc to complete an online application. As such, please answer the following:

1. Describe the CRM functionality and how the proposed solution would support marketing efforts in communicating with prospects sourced from procured lists. Examples include but are not limited to the College Board.
  - a. Describe the skills needed for the importing.
  - b. Describe the ability to communicate and track communications to prospects.
  - c. Describe how they can be labeled if they decide to attend another college.
  - d. Describe the ability to track the outcomes of each purchased list.
  - e. Describe the third party vendors who the product works with currently, the type of records it can create, how they are stored, and what (if any) roles a record can hold.
2. Describe how the CRM can help drive prospects to applicants. Please address various tools to help with traditional, nontraditional, and international populations.

Dual credit high school students comprise over 20% of the college's total credit hours. Currently, they submit a form in addition to an application to enroll in classes and a staff member manually registers the student in a class(es).

Westmoreland also offers programs regulated by the Commonwealth of Pennsylvania, such as a Police Academy and a Certified Nurse Assistant program. While these programs are noncredit programs, they require a selective admissions process and documents with signatures as a part of their application. These requirements have currently resulted in a manual process

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Many students “re-apply”, where they have stopped out for two years or more and are now returning to pick up their studies. There are also “non-degree” students who enroll during the summer or the regular semester to supplement their primary education at another institution. There are also specific programs, such as Nursing, that require prerequisites prior to assigning this major to the student; consequently, the student cannot immediately enroll in the program at the time of admission, and will be assigned to another degree program, such as A.S. in Health Sciences.

Key functionality of a new CRM would provide an easier process for this group of students to apply and register with their parent/guardian’s consent as well as:

- An easy direct application that can be set up with an application fee or not. Outline all skills needed to build applications. (i.e. basic HTML, Microsoft 365, etc.)
- The functionality to have multiple applications that cascade to different questions based on answers to meet the needs of all student populations
- Easy self serve editing tools
- The ability to upload and track specific documents
- The ability to manage applications that have not yet been completed - Provide a status that can be tracked. Document the details behind each status.

The ideal CRM will have solutions to meet these diverse populations. As such, please respond to the following questions.

1. Describe how your company’s CRM would differentiate the application process to meet the needs listed above for the diverse populations served by Westmoreland, please include how the proposed solution would support recruiting through program application/admission, including dual-enrollment (many of whom are minors thus communication with parent/guardian is essential) and restricted admissions programs such as Nursing.
  - a. Include how the proposed solution would support the customer relationship and communication flow, both internally and externally for credit and non-credit populations.
  - b. Indicate how documents (such as application, transcripts, letters of recommendation, professional credentialing, criminal background checks, etc.) can be uploaded and integrated into the workflow.
- i. Is the CRM able to recognize the type of document being uploaded? If so, please describe how this is done.
- ii. Is the CRM able to automate checklists and indicate when items are fulfilled? If so, please describe how this is done.
2. Please detail how test scores (such as ACT, SAT, AP, IB) and other supplemental information such as demographic or interest areas are imported.
  - Please address how data is imported and exported securely.
  - Please note if your company provides standard import/export packages/
  - Can we create our own import/export package? If so, what technical skill level does a user need?
  - Can we schedule imports/exports?
3. Please describe how the proposed solution will support students who are re-applying and shifting their start term as well as supporting students who are augmenting their primary education or are returning continuing education students?
4. Please detail how recruiters can send messages and direct mail pieces to students including how communication tracks can be established and managed moving forward. In addition, a part of the admissions staff’s time is spent reviewing and tracking the status of



applications through the point of decision-making using workflow designs. Describe how this can be supported with the proposed solution.

- a. Please identify the process for identifying possible duplicate records/applications and how your CRM resolves a duplicate record.
- b. Please describe the creation of a workflow and how it is assigned and tracked

### **Admitted through Placement**

After a student has been admitted into an academic program, which may be comprised of a degree, diploma and/or a certificate program, there is a planning process, initial advisement for the student, course registration, financial aid awarding, tuition and fee assessments, potentially visa application processing, and required payments. The College tracks and provides services for veterans, TRIO grant program participants, students with disabilities, athletes and other special populations. Student clubs and organizations are active and interested in leveraging technology tools to better promote activities and track attendance.

1. Please describe how your CRM would send an admit letter and communication.
2. Please describe how the CRM facilitates interaction between the functional departments and how information flows across functional areas (placement/assessment testing, registrar, advising/counseling, financial aid, student accounts) throughout these processes.
3. For transfer students, their academic transcripts must also be received, logged, and evaluated for academic credit including the review of transfer equivalencies. Please describe how the proposed solution would support both the student and the College throughout this process.
  - a. Please address how the documents would be collected, the communication between the SIS and CRM, workflows, and notification processes.
    4. For dual credit students, please describe how the CRM would ease the admission process and subsequent enrollment/payment of classes.
    5. Please describe the broadcast messaging to ease communications from application to admission to enrollment through the first day of class. Please provide information regarding emails and text messaging, including the following:
      - . Can we send messages to an unlimited number of recipients at one time?
      - a. Can we send messages to a group of records based on specific attributes (i.e., a visit or an event)?
  - i. Can this be done at varying levels, i.e. case management and tracked accordingly?
    - b. Can we use merge fields to customize messages?
    - c. Can we customize the message header?
    - d. Can we customize the look and feel of our messages using an HTML "What you see is what you get" (WYSIWYG) editor?
    - e. Can we create HTML templates with editable areas? Can we create templates using Drag and Drop?
    - f. Can we copy the previous HTML message and modify it for a new campaign?
    - g. Do you provide templates? If so, are they created using responsive design?
    - h. Can we store images to use in our messages within the CRM? IF yes, how much storage is included?
    - i. Can we include attachments in our messages?
    - j. Can we schedule messages?
    - k. Can we view an entire communication plan in a calendar format?
    - l. How does your CRM support CAN-SPAM compliance?
    - m. Do you have a texting tool?

- n. Did you develop your tool or is it offered through a third party?
  - o. Can we send two-way texts?
  - p. Are recipients required to opt-in to receive texts?
  - q. Can we view the full conversation in the CRM?
  - r. Can we schedule messages to be sent?
  - s. Can we send messages on demand and track responses?
  - t. Can you resend easily to those that did not open the email?
  - u. Can we see who did and did not receive messages and why?
  - v. What reports are out-of-bos within the CRM? Can reports be customized?
6. How does the proposed solution support the various reporting requirements for international students? For the scenarios above, please include what, if anything, would change if the student was an international student?
- . Does your CRM interface with commonly used apps for international students such as Whatsapp?
7. What is the selection process for building a targeted marketing list based on the students in the CRM?
- . Based on criteria, can the list update in real time?
- a. What is the skill set needed to build the targeted list? Please outline the training needed.

### 4.3 Advising and Student Program Planning

Advising is delivered through a caseload management model based on detailed multiple measures (*test scores, high school grades, number of developmental courses, GPA, etc.*). The advising caseload model, with its detailed criterion, has resulted in manually adding advisors to student records. The process is not only time-consuming, but also can result in data entry errors. It may take a few weeks for new students to have an advisor added to their record; therefore, students are initially unaware of whom to contact with advising questions.

Currently, if a student needs to speak with their advisor or counselor, the process varies according to the type of advisor. Appointments can be made with counselors by stopping by or calling the College's Information Center where staff make the appointment using Gmail. The inconsistent process for scheduling advising appointments is confusing to students; therefore, many students may not seek advising since it is not required prior to registration. Moving forward, Westmoreland seeks to launch an integrated online advising appointment system with the ERP that is used by all advisors and counselors. Ideally, such a solution would support the ability for all students to request appointments online, based on the advisor (including faculty advisor) availability.

1. Please describe the automation of advisor assignments that your CRM utilizes either at the time of admission or when a student initiates a change of major and how these parameters will be utilized to assign advisors.
  - a. How will the solution help a student establish, enhance, and maintain a relationship with their academic advisor?
  - b. Describe how advisor assignments become inactive either when a student is no longer enrolled, stops out, or graduates. In addition, describe how advisor assignments can be changed when the advisor separates from the college.
2. To reduce the number of phone calls and increase more efficiency for students, please describe how the proposed solution would support the ability for all students to request advising appointments online, based on advisor availability. Is there an integration with zoom? IF so, please describe the functionality and whether or not the zoom appointment is automatically scheduled?

3. Does the solution track student milestones, progress points, co-curricular activities, and soft skills when completed?
4. How are students and advisors (including faculty advisors) notified when changes are made?

#### **4.4 Student Success**

Throughout the student lifecycle, students must interact with various departments within Student Success and with departments outside of Student Success, including, but not limited to: Advising, Counseling, Students with Disabilities, Library Services, Services for Military Students, and Career Connections. It is imperative that pertinent student information can be shared between departments while maintaining FERPA-required confidentiality and protecting non-directory information.

1. Explain the proposed solution's ability to issue early academic and non-academic alert warnings to faculty and staff based on predefined criteria. Also consider how faculty and staff can follow students' progress and provide assistance. Please describe how the application integrations noted earlier in the RFP create a holistic ecosystem for early alerts and case management for the learner.
  - a. Please provide security parameters for the early alert system and case management, i.e., referrals to a Behavior Intervention Team or notation of drug and alcohol use/abuse. Please describe how this information is protected and apart from the other information for general viewing.
  2. How does the solution support student persistence and completion? Please consider these actions from a student lifecycle/student experience perspective (i.e., how do students interact with the solution and how do the various system components integrate to support continuous data/information flow to support the student throughout their academic pursuit?).
  3. Describe how the proposed solution can integrate and share information bi-directionally as desired/needed with common systems across the student success experience from advising, counseling to financial aid and registrations to assist the student in achieving their academic goals.
    - . Specifically note any notification processes that could be included in the CRM for students missing necessary documentation for financial aid or registration. Are these automated and a part of out-of-box functionality, or do they need to be customized?
      - a. Please note how "holds" on student accounts could be communicated to the students and possibly guardians/parents. Are these automatic?
      - b. Please note any ecosystem that is set up to support the student and the user and students communications triggered automatically from the system.
    4. Please describe how the proposed solution can track students with disabilities, required accommodations, and notifications to instructors to provide the accommodations. In addition, how can access to the information be restricted to a small population of end-users.
    - . Please detail system security requirements, levels, and settings

#### **4.5: Event Management**

1. Please describe the types of events that can be managed through the CRM.

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2. Does the system provide for management of multiple activities/sessions within a large event such as an Orientation?
3. Do the event management components of the CRM include event pages (e.g., event calendar, registration forms, landing pages, confirmation messages, etc.)? If so, can these be built using responsive design or are they already responsive? What level of technical expertise is required to customize the content of these pages?
4. Can we drive students to different events based on an attribute or set of attributes (e.g., prospective students versus admitted students, biology major versus English major, etc.)
5. Can we create an unlimited number of registration forms?
6. Is there functionality to send confirmations, reminders, and personalized itineraries for events once a person has registered, and will these messages allow for conditional logic in order to personalize responses?
7. Will the system allow a student/guest to make changes to their own registration?
8. Does the CRM allow collection of online payments for events, and is it able to calculate individualized fees based on data collected in the event registration (e.g., person type, selected event elements, etc.)?
9. What types of event information can be stored in the system (i.e. guest limits, locations, capacity, attendance, etc.)?
10. What features are included/available to help track event attendance and automate follow-up with no-shows and cancellations?
11. Does the CRM provide survey tools for evaluation of events?

#### **4.6: Reporting and Analytics**

1. Describe your system's ability to allow for cross-site tracking. Can it connect tracking done across institutional web properties and correlate it back to records in the CRM?
2. Describe your system's dash-boarding capabilities, content, and customization options. Does your CRM include standard and customizable report options?
3. Does it provide capabilities for year-over-year comparisons?
4. Are there standard reports that can be used to measure return on investment (ROI)?
5. What level of expertise is necessary to run reports? What level of expertise is necessary to create reports? Is there a limit to the amount of reports that can be generated?
6. What tools does your system have to help identify probability to enroll based upon interactions, origin, geography, alumni/parent history, test scores etc.
7. Do your reports provide a funnel snapshot? Are the drill-down capabilities to work with individuals at different stages? Can you do so based on specific case loads?
8. Can you monitor the numbers and types of interactions within the student success module, and positively correlate demonstrated behaviors (meeting with an advisor, going to tutoring) with a potential success/risk value?

#### **5.0: Implementation and Training**

1. Please describe your suggested timeline and strategy for implementation including the following:
  - a. The makeup and background of your company's leadership and implementation team.
  - b. The details of the campus level positions needed for implementation and the number of hours per position per week.
  - c. The total length of time for implementation.
  - d. Differentiation between on-ground and on-line implementation hours.
2. How quickly your company is typically able to begin implementation after contracting with an institution.
3. Please describe the process for converting to a post go live team.

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- . How are issues sent to them?
- a. What is the response time?
- 4. Training and knowledge transfer strategies for functional and technical users
- 5. Methods for providing ongoing training and support for new features, functionality, and other updates
- 6. Amount of documentation provided and how it is delivered and or updated.
- 7. How are new releases communicated? Are they mandatory? How long are the systems supported before the release must be taken? How often are new releases/product updates sent?
- 8. Please describe your commitment to client support including: what types of users can submit a support request and how those requests are submitted, support team hours of operation and response rates, and components of your CRM (if any) that require support from third-parties.

**References**

Please provide three community college references. If available, please include the names of the systems they integrated within the last two to three years.

Please include any and all ROIs as they relate to marketing, recruitment, retention, early alert, noncredit and credit students. Please include any relevant outcomes that could be measured.

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**REFERENCES:**

All proposals must include three (3) references including educational institutions (if possible). Local Pennsylvania references are preferred. References should include company name, contact name, address, phone, fax, and email address and contact information for the specific person who is knowledgeable about the contractor's record and performance. References may be contacted for consultation and/or site visits at our discretion.

NAME

COMPANY

ADDRESS

CITY/STATE/ZIP

PHONE/FAX

EMAIL

NAME

COMPANY

ADDRESS

CITY/STATE/ZIP

PHONE/FAX

EMAIL

NAME

COMPANY

ADDRESS

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**RFP #1001**

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Please fill in the requested information below and return by email, as acknowledgement that you have received the Request for Proposal noted above.

Email this to Dianna Pluto prior to: **December 15, 2023 prior to 4:00 P.M. EDT**

**Email to: [plutod@westmoreland.edu](mailto:plutod@westmoreland.edu)**

**By doing this, we will be able to provide responses to questions and notification of any addenda to the RFP.**

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

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

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Name: (Print) \_\_\_\_\_

\_\_\_\_\_

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

Email address: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Yes, our company does have an interest in responding.

\_\_\_\_\_ No, our company does **NOT** have an interest in responding.

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**CERTIFICATION OF CONTRACT/BIDDER**

The below signed contractor/bidder hereby certifies that it is not barred from bidding on this or any other contract due to any violation of Federal or State law.

---

NAME OF CONTRACTOR/BIDDER

---

SIGNATURE OF CONTRACTOR/BIDDER

---

TITLE

---

DATE

THIS FORM **MUST** BE RETURNED WITH YOUR BID TO:

Dianna Pluto  
Director of Purchasing  
Westmoreland County Community College  
145 Pavilion Lane  
Youngwood, PA 15697



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1. This Non-Collusion Affidavit is material to any contract awarded pursuant to this RFP. According to the Pennsylvania Antitrust-Rigging Act, 73 P.S. § 1611 et seq., governmental agencies may require Non-Collusion Affidavits to be submitted together with bids.
2. This Non-Collusion Affidavit must be executed by the member, officer or employee of the bidder who makes the final decision on prices and the amount quoted in the RFP.
3. RFP rigging and other efforts to restrain competition, and the making of false sworn statements in connection with the submission of proposals are unlawful and may be subject to criminal prosecution. The person who signs the affidavit should examine it carefully before signing and assure himself or herself that each statement is true and accurate, making diligent inquiry, as necessary, of all other persons employed by or associated with the vendor with responsibilities for the preparation, approval or submission of the RFP.
4. In the case of an RFP submitted by a joint venture, each party to the venture must be identified in the RFP documents, and an affidavit must be submitted separately on behalf of each party.
5. The term "complementary RFP" as used in the affidavit has the meaning commonly associated with that term in the RFP process, and includes the knowing submission of proposals higher than the proposal of another firm, any intentionally high or noncompetitive proposal, and any other form of proposal submitted for the purpose of giving a false appearance of competition.
6. Failure to submit an affidavit with the RFP in compliance with these instructions may result in disqualification of the proposal.

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**NON-COLLUSION AFFIDAVIT**

Contract Name \_\_\_\_\_ Contract/Bid No. \_\_\_\_\_

State of \_\_\_\_\_ County of \_\_\_\_\_

I state that I am \_\_\_\_\_ (Name and title) of \_\_\_\_\_ (Name of firm) and that I am authorized to make this affidavit on behalf of my firm, and its owners, directors, and, officers. I am the person responsible in my firm for the price(s) and the amount of this RFP.

I state that:

- (1) The price(s) and amount(s) of this RFP have been arrived at independently and without consultation, communication or agreement with any other contractor, vendor or potential vendor.
- (2) Neither the price(s) nor the amount(s) of this proposal, and neither the approximate price(s) nor approximate amount(s) of this proposal, have been disclosed to any other firm or person who is a bidder or potential bidder, and they will not be disclosed before bid opening.
- (3) No attempt has been made or will be made to induce any firm or person to refrain from responding to this contract, or to submit a proposal higher than this proposal, or to submit any intentionally high or non-competitive proposal or other form of complementary proposal.
- (4) The proposal of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- (5) \_\_\_\_\_ (Name of firm), its affiliates, subsidiaries, officers, directors, and employees are not currently under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by state or federal law in any jurisdiction, involving conspiracy or collusion with respect to submitting a proposal on any public contract, except as follows:\*

I state that \_\_\_\_\_ (Name of firm) understands and acknowledges that the above representations are material and important, and will be relied on by **Westmoreland County Community College** in awarding the contract(s) for which this proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from the Purchasing Agency of the true facts relating to the submission of this RFP.

---

(Name and Company Position)

SWORN TO AND SUBSCRIBED BEFORE ME THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_\_\_

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\*Note: Such a conviction of liability does not prohibit acceptance of your bid or award of a contract but may be a basis for a determination that you are not a responsible bidder. Please list any convictions or liabilities in an attached pages to this affidavit.

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At Westmoreland County Community College, we greatly value the contributions of our employees and their families. We kindly ask that family members of our dedicated staff refrain from participating in project bids. Your cooperation in this matter ensures fairness and equity in our procurement processes and compliance with our Purchasing Policy. By submitting to this request for proposal you are confirming that you are not a family member of a Westmoreland County Community College employee.

Thank you for your understanding and support in upholding our standard of integrity and equal opportunity for all involved.