

**REQUEST FOR PROPOSAL**

**Advancement Constituent Relationship Management (CRM) Solution**

**RFP #24-0515**

**Issue Date: May 15th, 2024**

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# **RFP ADMINISTRATIVE INFORMATION**

Issued: **May 15th, 2024**

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| RFP Title: | Advancement Constituent Relationship Management (CRM) Solution |
| RFP Project Description: | Lewis-Clark State College seeks proposals for an Advancement Constituent Relationship Management Solution |
| RFP Lead: | Jessica Waddington, Purchasing DirectorLewis-Clark State College500 8th AveLewiston, ID 83501Jlwaddington@lcsc.eduPh: 208-792-2431 |
| Submitting Sealed Proposal:Submitting Manually:MANUAL PROPOSALS MUST BE RECEIVED AT THE PHYSICAL ADDRESS DESIGNATED FOR COURIER SERVICE AND TIME/DATE STAMPED BY THE DIVISION OF PURCHASING PRIOR TO THE CLOSING DATE AND TIME.Submit electronically to LC State via e-mail:  | Jessica Waddington, Purchasing DirectorLewis-Clark State CollegeAdministration Building rm. 104500 8th AveLewiston, ID 83501**Submit by: June 19th 2024, 5:00 PM Pacific Time** Jlwaddington@lcsc.edu |
| LC State Purchasing website  | <https://www.lcsc.edu/purchasing/vendors/current-solicitations>All RFP information and updates will be posted here. |
| Pre-Proposal Virtual Conference Date/Time:Pre-Proposal Virtual Conference Location: | **May 22nd 2024, 9:00 AM Pacific Time**RFP Lead will provide you with virtual conference information upon registration. Attendance is optional, pre-registration is required. Email RFP Lead to pre-register.  |
| Deadline to Receive Questions: | **May 29th 2024, 5:00 PM Pacific Time** |
| Anticipated Release of Answers to Questions: | **June 6th 2024** |
| RFP Closing Date: | **June 19th 2024, 5:00 PM Pacific Time**  |
| Proposal Opening Date: | **8:00 AM** Pacific Time, in Purchasing Department on the first business day following the Closing Date. (Opening will be completed virtually. Email RFP Leads for attendance details).  |
| Virtual Demonstration:  | Tentatively scheduled for **July 1st and/or July 2nd 2024**, for offerors from whom a demonstration is requested. |
| Anticipated Selection/Award Date: | **July 8th 2024 by 5:00 PM PT**  |
| Initial Term of Contract and Renewals: | 3 Year initial term.Following the Initial Term, the parties may extend the Contract under the same terms and conditions, on an annual basis, upon mutual written consent for subsequent one-year periods (each a “Renewal Term”).  |
| **Lewis-Clark State college standard contract terms and conditions INCORPORATED BY REFERENCE: https://www.lcsc.edu/purchasing/vendors** |

# **Overview**

## Purpose

Lewis-Clark State College (LC State or the college) is requesting proposals for an integrated solution that provides functionality in Donor Relationship Management, Donation/Giving Management, Reporting and Analytics.

## Background Information

Lewis-Clark State College Advancement seeks new solutions to enhance our small team of individuals handling and processing between $3-$5 million in gifts annually. Currently, LC State utilizes Millennium by Community Brands in an on-premise installation as well as MIP Financial Software. We currently have 50,000 to 75,000 records in Millennium that would be included in the data transfer to the new solution. Additional applications are used in a variety of capacities including but not limited to GiveCampus (online giving).

# **pROCESS REQUIREMENTS**

## Restrictions on Communications

From the issue date of this RFP, until a contract is awarded, or the RFP is cancelled, Offerors are prohibited from communications regarding this RFP with LC State employees, evaluation committee members, or other associated individuals, except the RFP Lead.

## Pre-Proposal Conference and On-Site Campus Visit

An optional pre-proposal virtual conference will be held at the location and time as indicated in the RFP Administration Information section, page 1 of this RFP. This will be your opportunity to ask the college questions via a virtual meeting. All parties interested are invited to participate. Those choosing to participate must pre-register via email to the RFP Lead, with the name and contact information of all participants. Any oral answers given by the college during the pre-proposal conference are unofficial, and will not be binding on the college. Questions asked during the pre-proposal conference it are to be submitted in writing using Attachment 1, Offeror Questions. Conference attendance is at the participant’s own expense.

## Questions

* + 1. The RFP Lead is the only contact for this Solicitation. All correspondence must be in sent via e-mail. If it becomes necessary to revise any part of this RFP, amendments will be posted on LC State’s Purchasing website. It is the responsibility of parties interested in this RFP to monitor the LC State Purchasing website for any updates or amendments. Any oral interpretations or clarifications of this RFP must not be relied upon. All changes to this RFP will be in writing and must be posted to the LC State Purchasing website to be valid.

### Questions or other correspondence must be submitted in writing to the RFP Lead (see contact information in the RFP Administrative Information, page 1). QUESTIONS MUST BE RECEIVED BY THE DATE AND TIME LISTED IN THE RFP ADMINISTRATIVE INFORMATION SECTION.

### Written questions must be submitted using **Attachment 1 - Offeror Questions**. Official answers to all written questions will be posted on LC State Purchasing web page as an amendment to this RFP.

## Offeror Proposed Modifications and Exceptions to Requirements, Terms, and Conditions

* + 1. Offerors are strongly encouraged to submit any proposed modifications to the requirements, terms, or conditions of the RFP on **Attachment 1 - Offeror Questions** prior to the deadline to submit questions. Questions regarding these requirements must contain the following:
* The rationale for the specific requirement being unacceptable to the party submitting the question (define the deficiency).
* Recommended verbiage for LC State’s consideration that is consistent in content, context, and form with LC State’s requirement that is being questioned.
* Explanation of how LC State’s acceptance of the recommended verbiage is fair and equitable to both LC State and to the party submitting the question.
	+ 1. If a Proposal contains modifications or exceptions to any Solicitation requirements, terms, or conditions which are not addressed during the question-and-answer period, they must be identified and submitted on Attachment 2 - Modification and Exception Form and must contain the same information outlined in Section 2.2.1, above. LC State will not consider any modifications or exceptions that are not identified specifically on Attachment 2.
		2. LC State has sole discretion to determine if the modifications or exceptions submitted by an Offeror would result in a material change or otherwise threaten the integrity of the procurement process. Non-material modifications or exceptions may be discussed with the apparent successful Offeror, at the discretion of LC State; however, LC State shall have the right to reject any and all such modifications and/or exceptions, or to call an end to such discussions, and to instruct the Offeror to amend its Proposal and remove the modifications and/or exceptions. Failure to do so may result in LC State finding the Proposal non-responsive.
		3. Except as otherwise provided within the Solicitation, LC State will not consider modifications or exceptions to the requirements, terms, or conditions which are proposed after the RFP Closing Date.

## Proposals

* + 1. Proposals should be submitted on the most favorable terms an Offeror can propose, from both a price and technical standpoint, as well as with regard to legal terms and conditions. The college reserves the right to accept any part of a Proposal or reject all or any part of any Proposal received, without financial obligation, if the college determines it to be in the best interest of the college to do so.
		2. Discussions with individual Offerors (including the utilization of one or more rounds of Best And Final Offers (BAFO) and/or Negotiations) may be conducted as determined by the college to be in its best interest. Offerors should submit their best and most competitive cost proposal initially, as there is no guarantee that the college will conduct any discussions.
		3. No verbal Proposals or verbal modifications will be considered. An Offeror may modify its Proposal in writing prior to the RFP closing time. A written modification must include the date and signature of the Offeror or its authorized representative.
		4. Proposals that are qualified with conditional clauses or alterations or items not called for in the RFP documents, or irregularities of any kind, are subject to disqualification by the college at its option.
		5. All Proposal concepts and material submitted becomes the property of the college and will not be returned to Offeror unless the Solicitation is canceled by the college (State Code § 67-9215). Award or rejection of a Proposal does not affect this right. Proposals and supporting documentation may be available for public inspection upon written request following the announcement of a Contract award, except for information specifically labeled on each separate page as a “Trade Secret” under the Idaho Public Records Act, Section Title 74, Chapter 1, Idaho Code (“the Act”). Alternatively, information may be specifically labeled “exempt” from public records under another exemption found in the Act. Information specifically labeled as Trade Secret or otherwise exempt may be protected from disclosure, but only to the extent consistent with the Act or otherwise applicable federal or state law or regulation. Accordingly, the college cannot guarantee its confidentiality.

# **Instructions for Submission of Proposal**

The current version of LC State Standard Terms and Conditions are incorporated, by reference into this solicitation, and into any resulting contracts as if set forth in their entirety. Also incorporated by reference into this solicitation are Idaho Bills 189, 190, 191, and 294. LC State Standard Terms and Conditions are located at: <https://www.lcsc.edu/purchasing/vendors>. Failure by any submitting Offeror to review these documents will in no way constitute or be deemed a waiver by LC State of any term, condition or requirement contained in the referenced documents; and no liability will be assumed by LC State for a submitting Offeror’s failure to consider the LC State Standard Terms and Conditions in preparing its response to the solicitation.

## General Instructions

### Proposals may be submitted electronically or manually, as detailed below. Except as otherwise addressed in this solicitation, all submission materials must be submitted at the same time (in a single package or electronic submission). If multiple submissions are received, only the latest timely submission will be considered.

### Alternate proposals may be submitted and will be considered.

### All electronic files must be in PDF, Microsoft Word or Excel format; the only exception is for financials, brochures or other information only available in an alternate format.

## Public Records

### The Idaho Public Records Law, Idaho Code Sections 74-101 through 74-126, allows the open inspection and copying of public records. Public records include any writing containing information relating to the conduct or administration of the public's business prepared, owned, used, or retained by a State Agency or a local agency (political subdivision of the state of Idaho) regardless of the physical form or character. All, or most, of the information contained in your response will be a public record subject to disclosure under the Public Records Law. The Public Records Law contains certain exemptions. One exemption potentially applicable to part of your response may be for trade secrets.

### Prices that you provide in your Bid, Proposal or Quotation are not a trade secret. LC State, to the extent allowed by law and in accordance with these instructions, will honor a designation of nondisclosure. Any questions regarding the applicability of the Public Records Law should be addressed to your own legal counsel PRIOR TO SUBMISSION of your Bid, Proposal or Quotation.

## Redacted Information

If your Proposal contains information that you consider to be exempt, you must also submit a redacted copy of the Proposal with all exempt information removed or blacked out. The college will provide this redacted Proposal to requestors under the Public Records Law, if requested. Submitting Offerors must also:

###  Identify with particularity the precise text, illustration, or other information contained within each page marked “trade secret” (it is not sufficient to simply mark the entire page). The specific information you deem “trade secret” within each noted page must be highlighted, italicized, identified by asterisks, contained within a text border, or otherwise clearly delineated from other text/information and specifically identified as a “trade secret.”

### Provide a separate document entitled “List of Redacted Trade Secret Information” which provides a succinct list of all trade secret information noted in your Proposal; listed in the order it appears in your submittal documents, identified by Page #, Section #/Paragraph #, Title of Section/Paragraph, specific portions of text/illustrations; or in a manner otherwise sufficient to allow LC State’s procurement personnel to determine the precise text/material subject to the notation. Additionally, this list must identify with each notation the specific basis for your position that the material be treated as exempt from disclosure and how the exempting the material complies with the Public Records Law.

### Submit a redacted copy of the Proposal with all trade secret information removed or blacked out. The redacted copy must be submitted electronically, with the word “redacted” in the file name, whether the Proposal is submitted manually or electronically.

### Offeror shall indemnify and defend LC State against all liability, claims, damages, losses, expenses, actions, attorney fees and suits whatsoever for honoring a designation of exempt or for the Offeror’s failure to designate individual documents as exempt. The Offeror’s failure to designate as exempt any document or portion of a document that is released by LC State shall constitute a complete waiver of any and all claims for damages caused by any such release. If LC State receives a request for materials claimed exempt by the Offeror, the Offeror shall provide the legal defense for such claim.

## Insurance Requirements

### (M) At a minimum, the Offeror and its sub-contractors are required to carry the types and limits of insurance referenced in the Insurance Requirements section of the LC State Terms and Conditions. Offeror is required to provide the college with a Certificate of Insurance meeting the requirements listed in the Insurance Requirements section of the LC State Terms and Conditions, prior to Contract signing.

## Electronic Submission

### Electronically submitted Proposals must be submitted to the email address identified in the RFP Administration Information Section. Remember to submit an additional redacted version of the proposal if you have identified trade secrets.

## Manual Submission

### The Proposal must be addressed to the RFP Lead, sealed, and identified as **“RFP #24-0515 Advancement Constituent Relationship Management (CRM) Solution”**. Include your company name on the outside of the package. The Cost Proposal must be separately sealed, identified as “Cost Proposal - **RFP #24-0515 Advancement Constituent Relationship Management (CRM) Solution”.** The Technical Proposal and separately sealed Cost Proposal must be submitted at the same time (place all proposal response materials within a larger package).

Each proposal must be submitted in one (1) original with five (5) copies of the Technical Proposal and one (1) original and one (1) copy of the Cost Proposal. Offerors submitting manually must also submit one (1) electronic copy of the proposal on USB

Device or via email. Word, PDF or Excel format is required (the only exception is for financials, brochures or other information only available in an alternate format). The format and content must be the same as the manually submitted proposal. The electronic version must NOT be password protected or locked in any way.

# **Proposal Format**

These instructions describe the format to be used when submitting a Proposal. The format is designed to ensure a complete submission of information necessary for an equitable analysis and evaluation of submitted Proposals. There is no intent to limit the content of Proposals.

## Evaluation Codes

**(M) Mandatory Response** - failure to respond to any (M) section, or to comply with any mandatory specification or requirement, will render Offeror’s Proposal non-responsive and no further evaluation will occur.

**(ME) Mandatory and Evaluated Response** - failure to respond to any (ME) section, or to comply with any mandatory specification or requirement in an (ME) section, will render Offeror’s Proposal non-responsive and no further evaluation will occur. Offeror must respond to these sections as directed; points will be awarded based on predetermined criteria.

**(E) Evaluated Response** - a response is desired and will be evaluated. If not available,

respond with “Not Available” or other response that identifies Offeror’s ability or inability to supply the

item or service. If Offeror cannot meet the requirement, or chooses not to respond for any reason, zero (0) points will be awarded for the section. If Offeror responds, points will be awarded based on predetermined criteria.

Note: Offerors are directed to IDAPA 38.05.01.074.03.a, as well as IDAPA 38.05.01.091.05, which allow

the designated LC State official to waive minor informalities as well as minor deviations. The

college also reserves the right to seek clarification on any M or ME requirement.

## Table of Contents

Include a table of contents in the Proposal identifying the contents of each section, including page numbers of major Sections.

## Format

**Proposals must follow the numerical order of this RFP** starting at the beginning and continuing through to the end of the RFP. **Proposal sections and subsections must be identified with the corresponding numbers and headings used in this RFP. In the response, the RFP section and/or subsection must be restated, followed with the response.**

Offerors are encouraged to use a different color font, bold text, italics, or other indicator to clearly distinguish the RFP section from the Offeror’s response. Except for brochures, financials, work samples, or other similar submission items, all electronic Proposals must be submitted in Microsoft Word or Excel, or PDF format, and must not be locked. Offerors are strongly cautioned against including website links or imbedded documents in the Proposal; LC State will not be responsible for the RFP Lead or any evaluator’s failure to consider information outside of or imbedded in the Proposal.

# **Mandatory Submission Requirements**

The proposal begins with the mandatory items identified in this list and the following sections. **NOTE: THIS CHECKLIST IS PROVIDED AS A COURTESY ONLY; OFFERORS ARE RESPONSIBLE FOR SUBMITTING ALL MANDATORY SECTIONS, ATTACHMENTS, SUBMITTAL ITEMS, ETC., REGARDLESS OF WHETHER THEY ARE IDENTIFIED IN THIS LIST.**

**See section 4 for Proposal Format requirements.**

[ ]  (M) Cover Form: Complete, sign, and submit **Attachment 3, Cover Form.** All Proposals must be submitted with the completed and signed Attachment 3, Cover Form.

[ ]  (M) Acknowledgement of Amendments: If the RFP is amended, the Offeror must acknowledge each amendment with a signature on the acknowledgement form provided with each amendment. Failure to return a signed copy of each amendment acknowledgement form with the Proposal may result in the Proposal being found non-responsive. See IDAPA 38.05.01.52.

[ ]  **Section 6**: Provide response to all (M) and (ME) sections, and any other required submittal items.

[ ]  **Section 7**: Provide response to all (M) and (ME) sections, and any other required submittal items.

[ ]  **Section 8**: Provide response to all (M) and (ME) sections, and any other required submittal items.

[ ]  (ME) **Section 9** **Cost Proposal**: Provide your cost information on the form provided in Attachment 4.

[ ]  (M) Executive Summary: Include an executive summary in the Technical Proposal, providing a condensed overview of the contents of the Technical Proposal that demonstrates an understanding of the services to be provided.

[ ]  (M) Redacted copy of Proposal and list of Trade Secret redactions, as detailed in **Section 3, if applicable.**

[ ]  Review the required types and levels of insurance—these are mandatory requirements. If you do not already have the required types and levels of insurance, you are **strongly encouraged** to contact your insurance representative to find out if you will be able to obtain the required insurance. (The Offeror should not purchase additional insurance in reliance of being awarded a contract). If you are awarded a Contract, failure to provide proof of the required insurance will be grounds for termination of the Contract.

# **Business Information**

## (ME) Experience

Describe in detail your knowledge and experience in providing services similar to those required in this RFP. If possible, include a list of higher education institutions where you have provided similar services in the past 5 years. If your company has limited higher education experience, list experience that is as similar as possible.

## (ME) References

Provide contact information for three (3) references. LC State prefers to receive references from higher education institutions who utilize Ellucian Ethos in their ERP integration. If you have limited references from higher education, ask for references from entities as similar to higher education as possible. LC State reserves the right to contact your references by phone and/or email; and to contact other entities with whom your firm has done business, whether or not they were provided as a reference.

## (M) Business Profile

Provide a profile of your business including Offeror’s business history, description of current service area, and customer base.

## (M) Organizational Chart

Provide a copy of your organizational chart, including detail of any relationships with parent and subsidiary organizations.

## (ME) Demonstrated Success

Provide specific data demonstrating prior success with clients, preferably similar in institution size and demographics to LC State.

## (E) Customer Satisfaction

Provide up to 5 years of summarized customer feedback as well as information on how your company utilizes that feedback to improve services.

# **Organization and Staffing**

Describe your qualifications to successfully complete the requirements of this RFP by providing a

detailed response to the following:

## Key Personnel (M)

### Provide a list of key management, customer service, and other personnel, and their qualifications to be used in the fulfillment of this contract.

### Include a list of projects these individuals have worked on (with dates of engagement), a description of the project, and the role of each individual. For positions that are not filled, a position description (including requisite qualifications, certifications, and experience) must be provided. In the event the personnel identified initially for this project become reassigned or are no longer available to perform the requirements of this contract, Offeror shall be required to submit replacements qualifications and years of experience to LC State for review and acceptance of personnel assuming the responsibilities of the project. The college reserves the right to reject a proposed replacement(s). If a proposed replacement is rejected, the Offeror shall put forward another individual(s) for review and acceptance.

## (M) Subcontractors

### If you intend to utilize subcontractors, describe the extent to which they will be used to comply with Contract requirements. Include each position providing service and provide a detailed description of how the subcontractors are anticipated to be involved under the Contract. Include a description of how the Offeror will ensure that all subcontractors and their employees will meet all Scope of Work requirements. NOTE: The information provided for subcontractors, if any, will be evaluated as part of Section 7.2, Other Key Personnel and Qualifications.

### If you do not intend to utilize subcontractor(s), provide a statement to that effect.

# **Scope of Work AND DELIVERABLES**

**All sections of the Scope of Work are required contract services.** This proposal outline is to be used in response to the RFP. Evaluators will be scoring the proposal based on the methodologies proposed and the completeness of the response to each item listed below. Offeror’s must describe in detail how each requirement will be met. Requirements are marked (M) or (ME) below. Offer should include personnel, proposed timelines, methodologies, and any pertinent information that will be required from the college in order to achieve full compliance with all tasks and deliverables.

## (M) General Requirements

#### Lewis-Clark State College requires a comprehensive, integrated solution to support Donor Relationship Management, Donation/Giving Management, Reporting and Analytics.

## (ME) Features, Capabilities and Controls

The following are core functional areas with key scenarios that LC State seeks a solution to meet.

### **Stewardship**

The solution must support the following functionality:

#### Send the constituent/donor a digital or physical thank you with an impact message after a gift is received and processed, and trigger the creation of tasks/workflows to facilitate the process.

#### Trigger the creation of tasks/workflows when gifts are made, setting them up for management/follow-up with indication of types (scholarships, operations, etc.) including notifications to appropriate college areas.

#### Ability for staff outside advancement to retrieve key information about the award requirements, including full gift agreement.

#### Ability to create digital and physical letters, invitations, etc. that can be emailed or sent to a printing vendor for physical creation and distribution.

#### Ability to generate reports and lists on schedule requested by donor (monthly, quarterly, annually, irregular), with manual override.

#### Ability to produce honor rolls based on multiple sets of criteria (e.g., campus wide giving, unit/department giving, campaign giving, etc.).

#### Ability to maintain information on scholarship and endowment accounts, such that all documentation regarding the account is available, and donors who should be stewarded are linked to the accounts. Examples of use for this data model include the production of donor endowment reports, and tracking of stewardship activities between scholarship donors and the students who receive the scholarship.

### **Donor Strategies and Constituent Engagement**

The solution must support the following functionality:

#### Facilitate basic facets of fundraising activities.

#### Workflow and reporting on existing and newly identified constituents. Including raising of notices on profile data updates, potential opportunities, upcoming event inclusion, solicitations, etc.

#### Ability to pull population reports by geographic locations for constituent outreach.

#### Ability to set fund raising goals and review progress including recommendations on how to get back on track if needed. Proactive alerting and task generation when underperforming.

#### View constituent profiles with varying amounts of detail.

#### Plan follow-up activities/interactions for a constituent; including starting of predefined workflow processes.

### **Prospect Research/Management**

The solution must support the following functionality:

#### Identify constituents that are not assigned to a Development Officer based upon data imported/received recently.

#### Manage stages of the constituent lifecycle – Identification, Qualification, Cultivation, Solicitation, Stewardship, Future, Lifelong, etc.

#### Constituent hand-over process management between teams such as Research, Development Officer, and Stewardship.

#### Generate constituent profiles (brief / quick and in-depth,) for an individual donor, company, or foundation.

#### Facilitate wealth screening process and scoring either natively or via third-party vendor.

#### Proactively check for data quality and send notifications to the correct group when data is out of tolerance.

#### Identify events like marriage, death (Obituary), birth checks, etc. either natively or via third-party vendor. Append data to constituent and trigger the creation of notifications, tasks and/or workflows to facilitate process.

#### Identify events in the news media or social media either natively or via third-party vendor. Append data to constituent and trigger the creation of notifications, tasks and/or workflows to facilitate process.

#### Ability to generate custom entity profiles without having to re-format in another program. The profile report would allow users to select which elements they wanted to see, run report and have the report delivered immediately.

#### Ability to provide automated ticklers for upcoming tasks and actions. Alerts can be shown at solution login and sent via email.

#### Ability to track and report on multiple solicitations for a prospect including such information as: Solicitation/proposal ask amounts, start/end dates, stages with donors, status, campaign, staff and volunteer assignments, segmentation (e.g., major gift, annual fund, principal gift), solicitation method, purpose, approval, outcomes, comments, and contract types/purposes.

#### Ability to store miscellaneous important attributes about a constituent, including, but not limited to: biographic information, asset information, personal interests, post graduate affiliations, familial and other relationships.

#### Ability to generate custom entity profiles without having to re-format in another program. The profile report would allow users to select which elements they wanted to see, click on run, and have the report delivered immediately.

#### Ability to generate profiles for individuals or groups of prospects.

#### Ability to flag address fields (including street, email or phone) as "preferred".

#### Ability to maintain multiple preferences related to each address category (e.g. home address(es), business address).

#### Ability to maintain multiple mailing preferences for one constituent to accommodate different campus organizations.

### **Annual Giving**

The solution must support the following functionality:

#### Solicit gifts from potential constituents.

#### Generate reports and dashboards for outreach efforts, ensure interactions are noted on constituent accounts.

### **Gift Administration**

The solution must support the following functionality:

#### Tools to receive all gifts (mail, electronic, etc.) and attaches to constituent record, automatically if possible.

#### Ability to manage varied degrees of anonymous gifts, including but not limited to completely unknown donors, known donors who want limited confidentiality, known donors who do not mind that that campus knows, but who do not want public acknowledgment.

#### Ability to manage multiple, complex pledges.

#### Ability to generate pledge reminders (paper and email) on schedule requested by donors such as monthly, quarterly, annually, irregular and also manual reminders. Ability to record in solution when the reminder was sent, method (email, USPS), and to what address.

#### **(E)** Solution must have the ability to handle athletics related gifts and benefits such as preferred seating.

#### Ability to handle gifts and fees in one transaction and split the amounts between different funds or allocations.

#### Ability to handle multiple variations of legal and soft credit.

#### Solution must have flexible tender type codes that can be added to and modified for different gift types.

#### Ability to record non-gift transactions, such as event revenue, separate from gifts on the donor record.

#### Ability to calculate gift fee based on fee administration rules for each transaction with an audit trail.

#### Ability to set up discount rates for pledges in order to determine the amount of write-offs.

#### Ability to record and keep track of sponsored research grants and report separately from gifts.

#### Ability to track matching grants, e/g when a donor’s gift is matched with an internal fund account.

### **Receipt requirements**

The solution must support the following functionality:

#### Ability to generate receipts for gifts.

#### Receipts can reflect and distinguish between tax deductible contributions and nondeductible benefits.

#### Ability to generate a single receipt for a gift with multiple designations detailed.

#### Receipts can be generated by gift batch and manually for specific transactions

#### Receipts can be scheduled on an annual basis. For example, a donor who makes monthly payments (such as payroll deduction) should be able to choose an annual receipt.

#### Receipts should have the ability to have descriptive data added where appropriate, such as the description of a gift in kind, possibly an appraiser, and details of stock shares received or other information.

#### Receipt format may be customizable to allow for central production of receipts for multiple foundations, branded for multiple units with the "look and feel" of the unit

#### Receipts should also be able to be selected by a media type based on donor preferences. For example, a donor may wish to receive an e-receipt only.

### **Planned Gift Tracking**

The solution must support the following functionality:

#### Ability to track required information on a variety of planned gifts (bequests, annuities, life estates, pooled income funds, and trusts), including executor or trustee, trust name, status, other beneficiaries, Market/estimated/actual values, estimated/actual maturity, comments, revocability, valuation dates, each with market value, future value, and source, projected payout information, professional contact (without creating a new record and relationship).

#### Ability to view the planned gifts a constituent has committed to the institution which may include multiple gifts of varying types.

#### Ability to calculate net present value and other discounted amounts for planned gifts.

#### Ability to correct for payments that are less than or more than original gift.

#### Ability to track a contact person for the bequest (e.g. accountant or attorney) without having to create a database record for the contact.

### **Non-Cash Gifts**

The solution must support the following functionality:

#### Ability to record information necessary for the appropriate reporting of common planned giving instruments such as revocable requests, trusts, and charitable gift annuities, such as present value and face value.

#### Ability to record gifts of life insurance, and the associated fields such as cash surrender value, proceeds, premium payments, and termination amount.

#### Ability to record pledges.

#### Ability to attach scanned donor agreements.

#### Ability to schedule pledge payments at any frequency.

#### Ability to reduce the amount pledged.

#### Ability to split a pledge over multiple funds.

#### Ability to share a pledge with multiple unrelated constituents.

#### Ability to give campaign credit for a pledge to another constituent.

#### Ability for one constituent to make payments on another constituent’s pledge.

#### Ability to monitor past due pledges.

#### Ability to record all non-cash gifts, such as real estate, art, equipment, licenses, and other forms of gifts-in-kind.

### **Alumni Engagement**

The solution must support the following functionality:

#### Event creation, oversight, and RSVP management.

#### Generate reports, notifications and/or workflows for constituents to receive gifts/recognition/etc. for constituent life events (birthdays, marriages, births, etc.).

#### Subscription based membership management (i.e., LC State President's Circle and other giving societies)

#### Ability to pull population reports by geographic locations for constituent outreach and management.

### **Athletic focused Donors / Gifts**

The solution must support the following functionality:

#### Reporting based on donor/constituent category (i.e., Athletic focused donor reporting).

#### Generate constituent lists for focused campaigns.

#### Tools allowing development officers to conduct constituent outreach and solicitation.

### **Relationships**

The solution must support the following functionality:

#### Ability to integrate with other college systems including Colleague.

#### **(E)** Ability to integrate with the college’s scholarship portal, NextGen.

#### Ability to create relationships between donations, awarded scholarships and the students receiving the scholarship.

#### Log constituent attendance to events.

### **System Records**

The solution must support the following functionality:

#### Tools for ensuring data quality and constituent data accuracy. Examples include but are not limited to:

#### Staff are able to run report of integration processes and review activity including items to be reviewed, errors encountered, and last run date/time.

#### Transactional logging of data read/write to Colleague must be available.

####  For example, through data integration, updates to records in Colleague will feed into the Advancement CRM, updating graduation, employment (faculty, staff, and student), enrollment, demographics, and other applicable fields.

## (ME) Reporting, Workflow, and Data Features

### Solution must include focused dashboards with high level and detailed views.

### Solution must include ability for development staff to pull reports by pointing and clicking the desired data cells (name, address, degree, last 5 years of giving, lifetime total, etc.)

### Provide a list, description and where possible an example of the standard reports delivered as part of the solution.

### Solution must have ability to download lists/reports into common applications such as Word, Excel, etc.

### Solution must allow end-users to perform segmentation and solicitation queries without the assistance of a programmer.

### Solution must allow end users to query any data element in the solution through the user of a query tool.

### Solution must have the ability to generate preformatted Voluntary Support of Education report that complies with CASE standards.

### Describe what capabilities are provided for delivered and ad-hoc queries and reporting.

### Solution must include Custom reporting must allow the option to include customer-defined fields.

### Solution must include ability to design customized standard report queues to be run at regular intervals (daily, weekly, monthly, and on user-specified occasions) without operator intervention.

### Describe existing data validations/verifications available, including building of customer defined custom rules/checks to be performed.

### Describe your workflow capabilities and task assignment capabilities.

### Provide a list and description of delivered business process definitions/maps/guides/etc. Include how these processes can be integrated with external applications.

### Describe data captured and availability of the logs for users, exports to other systems, and how long they are kept.

## (ME) Financial Management

### Solution must provide a donor financial tracking and reporting component.

### Solution must be able to integrate with Colleague.

### Solution must support ability to enter gift records (capturing constituent type (parent, student, corporation, etc.), gift type (cash, check, securities, pledge, in kind, etc.), attach to a constituent record, and be transmitted to Colleague.

### Solution must support ability to attach files to the gift record, such as pdf and jpeg.

### Solution must include flexible templates and fields for batch and single gift entry.

### Solution must support ability to review and edit donor records from within gift entry.

### Solution must allow summary and detailed reporting, including by designation, constituent type (parent, student, corporation, etc.), gift type (cash, check, securities, pledge, in kind, etc.).

### Solution must include report formats must of excel, csv, and pdf.

### Solution must support ability to report financials using either FASB or GASB standards (LC State currently operates under GASB standards).

### Solution must allow for journal entries to record expenses, transfer and other financial activity (for example, recording of pledge payments, scholarships).

### Solution must support ability to customize approval workflows for all entry types.

### **(E)** Provide a market allocation calculator and the ability to post entries.

### Solution must have the ability to generate balance sheet, statement of activities, cash flow statement, and with and without restrictions worksheet.

### Solution must support ability to easily reconcile subsidiary ledger (cash receipts/pledges) to general ledger.

### Solution must be able to reconcile credit card confirmation # with gift record and reconcile with bank statement.

### Solution must be able to generate a detailed audit log to record changes or actions and the user making those changes.

### Solution must allow automated daily postings and updates.

### Solution should provide a deposit-based report for cashier deposit and reconciliation with bank statement.

## (ME) Communication and Branding

### Describe methods of communication (i.e., hard-copy mail, email, text/SMS, mobile app notification, etc.) available from / by the solution or through third party integrations. Describe how communication from the solution works.

### Describe what capabilities are provided to customize branding of the user interface, including headers, footers, images, logos, fonts, etc.

## (ME) Infrastructure

### Solution must be vendor cloud hosted.

## (ME) Integration

### Solution must allow for automated transfer of data to and from the Ellucian Colleague via Ellucian Ethos, with little to no end-user/programmer intervention.

### Solution must demonstrate compatibility with current program integrations, which included but at not limited to: Colleague, GiveCampus, Handshake, Double the Donation, CyberGrants, MarketSmart and DocuSign.

### List your integration technologies including abilities to do batch and real-time data processing. Describe the business/technical functions that are Web Service / API accessible. Include any Web Service / API technical documentation available.

## (ME) Mobile Capabilities

### Must allow access to cloud-based solution in a mobile friendly website.

### **(E)** Describe the mobile capabilities, including apps for specific mobile devices, responsiveness in sites, any limitations on mobile device/table versions, etc.

## (ME) Additional Technology Requirements

### Must be able to accept data from automated transfer of data to and from Ellucian Colleague , with preference given to direct API integration using Ellucian Ethos.

### Must provide upgrades to software during length of contract to keep LC State on most current supported software version.

### Complete **Data Security Requirements /PCI Compliance,** Attachment 5 and submit with your proposal.

### Describe what proposed options are available in the event of a system outage.

### Describe how your solution limits access to data through interfaces and reports.

### Solution must have the ability to control user access permissions.

## (ME) Support

### Provide phone and email support during the hours of 8:00 AM to 5:00 PM Pacific Time.

### Provide a dedicated account/customer manager.

### **(E)** Provide chat support during 8:00 AM to 5:00 PM Pacific Time.

## (ME) Implementation

### The solution must be live and ready for use by October 1st, 2024, or at an earlier mutually agreed upon date, if feasible.

### A detailed timeline for implementing your solution is required. Implementation to begin approximately August 1st, 2024, or other mutually agreed upon date. Describe institutional and vendor roles and responsibilities and time commitments recommended for data transfer and training. Provide a projected timeline or calendar identifying milestones and deliverables.

### Describe your post-implementation customer support model including any priority system to provide for urgent support, hours of operation, location of support services, methods of support (ticket, phone, chat, etc.), amount of support hours provided, any additional cost, and any planned changes to this model.

### Upgrades (system functions and features), updates, and enhancements must be included in the annual support fee, and offeror must detail its protocol for seamlessly rolling out upgrades, updates, and enhancements into the existing system after extensive internal quality assurance testing.

### Provide a transition plan that identifies each step in the process to transition from current state to new platform.

### Must provide assistance converting legacy data to the new system, including the mapping of table data.

### Must be able to provide assistance with data cleansing required prior to conversion.

### Provide an overview of data migration options.

## (ME) Training

### Administrative/Technical Training: System administrators must receive configuration and security training, designed to provide product administrators with an understanding of how they must approach installation, configuration, setting up users’ security set-up, data connections and troubleshooting. The training must be provided at no cost to customer.

### Functional Training: Functional training must be provided to users of the system and will be designed to provide functional area expertise in the product as it relates to their responsibilities and needs. This training covers basic use, product navigation, queries and reporting, tips and tricks. The training can be customized to specific audience and needs. The training must be provided at no cost to customer. Functional training may include online and interactive live training, webinars, downloadable recorded training, written and downloadable documentation, context-based help, and on-site training.

### Ongoing Training: Additional training must be available at no additional cost, including for any system updates and releases.

### Detail experience in providing the above and provide a training plan and timeline. Describe the training that is available during implementation and post-implementation.

### Describe estimated technical and functional full-time employees that LC State will need to support the new platform in an ongoing fashion.

## (E) RISKS AND CONSTRAINTS

### Based on the Scope of Work detailed in this RFP, identify any risks or constraints that you will need to address prior to or during the performance of the Contract; as well as a description of how you will address each one. In addition, please identify the following:

### What challenges you anticipate in providing the services identified in this RFP.

### How you will manage those challenges.

### What assistance you will require, if any, from LC State.

# **Cost Proposal**

**(ME)** **Cost Proposal:** Use Attachment 4 to respond to the Cost Proposal of this RFP. Do not alter the format of the attachment. Doing so may cause your proposal to be found nonresponsive. Offerors must provide fully-burdened rates which must include, but not be limited to, travel costs, administrative costs, and all other work that will be required to meet the scope of work in this RFP.

# **Proposal Review, Evaluation, and Award**

## Overview

The objective of LC State in soliciting and evaluating Proposals is to ensure the selection of a firm or individual that will produce the best possible results for the funds expended.

### All Proposals will be reviewed first to ensure that they meet the Mandatory Submission Requirements of the RFP as addressed in Sections noted with an (M). Any Proposal(s) not meeting the Mandatory Submission Requirements will be found non-responsive.

* 1. **Technical Proposal**
		1. The Technical Proposal will be reviewed first on a “pass” or “fail” basis to determine compliance with those requirements listed in the RFP with an (M) or (ME). All Proposals which are determined by LC State, in its sole discretion, to be responsive in this regard will continue in the evaluation process outlined in this Section.
		2. The Technical Proposals that pass will be evaluated and scored by a Proposal Evaluation Committee.
		3. The criteria described in the Evaluation Criteria section will be used to evaluate and score the Proposals for the purpose of ranking them in relative position based on how fully each Proposal meets the requirements of this RFP. Particular emphasis will be placed on the Offeror’s understanding of the RFP, quality of product/service, and the description of how the activities will be performed.
		4. The scores for the will be normalized as a whole, or by category, at LC State’s sole discretion. Except cost, the Proposal with the highest raw score will receive all available points in total or by category total. Other Proposals will be assigned a portion of the maximum available points, using the formula:

(Raw score of Proposal being evaluated / highest raw score) x total possible points.

* 1. **Demonstration**
		1. LC State may invite several top scoring Offerors to provide a Demonstration. These Offerors may be asked to make Demonstrations to show the evaluation committee how their proposal meets the requirements in this RFP. All expenses associated with this part of the evaluation are the responsibility of the Offeror.
		2. Demonstrations will be evaluated and scored by a Proposal Evaluation Committee. LC State may request multiple Demonstrations if further clarification is needed. The demonstration becomes an official part of the response. LC State will utilize “Evaluated” and/or “Pass/Fail” demonstrations, as described below.
			1. **(E)** Evaluated Demonstrations - At the discretion of the college, several of the highest-scoring Offerors may be contacted to give an overview/Demonstration of their service and respond to questions. (Evaluation of the Demonstrations may result in adjustment of points awarded in the Business and Scope of Work Proposals, as the evaluation committee deems appropriate.) Failure to successfully demonstrate functions of the service listed as mandatory in this RFP may result in rejection of the proposal. LC State may request multiple demonstrations from the several top scoring Offerors.
			2. **(E)** Pass/Fail Demonstration - Alternatively, the college reserves the right to require an overview/Demonstration of only the top-scoring Offeror. If this option is chosen, the evaluation is strictly Pass/Fail for the apparent successful Offeror. If the apparent successful Offeror fails, then the next highest-scoring Offeror will be considered the apparent successful Offeror and the Demonstration process may be repeated.
			3. For those Proposals meeting mandatory requirements and making it to the Demonstrations, the total evaluation points will be summed with the cost points and Demonstration points, and the Proposals will be ranked by final total score.
		3. Pricing will be evaluated using a cost model that offers LC State the best possible value over the initial term of the Contract. Cost evaluation will be figured by applying the Offeror supplied costs from the Cost Proposal Attachment 4 to LC State’s estimated usage, as applicable. Award will be to the responsive, responsible Offeror whose Proposal receives the highest number of points in the respective category.
		4. The scores for the Cost Proposal will be normalized as follows: The Proposal with the lowest overall total cost proposed will receive all the cost points as assigned in the Evaluation Criteria below. Other Proposals will be assigned a portion of the maximum score using the formula:

Lowest Cost / Other Proposal cost x total possible cost points.

* 1. **Evaluation Criteria**

Step 1: Technical Proposal

Mandatory Submission Requirements Pass/Fail

Business Information (Section 6) 200 points

Organization and Staffing (Section 7) 100 points

Scope of Work (Section 8) 700 points

**Step 1 Total 1000 points**

Step 2: Presentation/Demonstration 300 points

**Step 2 Total 300 points**

Step 3: Cost Proposal (Section 9) 200 points

**Grand Total Points** **1500 points**

* 1. **General**
		1. LC State reserves the right to conduct interviews with all or some of the Offerors at any point during the evaluation process; however, the college may determine that interviews are not necessary. In the event interviews are conducted, information provided during the interview process shall be taken into consideration when evaluating the stated criteria.
		2. The college reserves the right to accept or reject any or all proposals, waive any informalities or minor technical inconsistencies, or delete any item-requirement(s) from this RFP or resulting Contract when deemed to be in the college's best interest. Representations made within the proposal will be binding on responding Offerors. The college will not be bound to act by any previous communication or proposal submitted by the Offerors other than this RFP.
		3. Negotiations with Select Offerors - at LC State’s sole option and discretion, the college may discuss and negotiate all elements of the proposals submitted by one or more selected Offerors whose proposals are within a competitive range determined by the college.
	2. **Responsibility**
		1. Pursuant to IDAPA 38.05.01.081, the RFP Lead may, in LC State’s sole discretion require the apparent high point Offeror to provide documentation to demonstrate its responsibility. The RFP Lead may request documentation including, but not limited to, credit or financial reports, and references. Failure to provide requested documentation may result in the Offeror being deemed non-responsible. Nothing herein shall prevent LC State from using other means to determine Offeror’s responsibility.
	3. **Revision of Proposals**
		1. After submission of a proposal but before the final selection of the successful proposal is made, LC State may select one or more Offerors to revise their respective proposals in order to obtain the best and final offers of such proposal.
		2. In the event, representations made by an Offeror in its revised proposal, including price, scope and consideration quotes, will be binding on the Offeror.
		3. LC State will provide each selected Offeror within the competitive range an equal opportunity for discussion and revision of its proposal.
	4. **Determination of Successful Offeror**
		1. LC State may make the selection of the successful proposal based on the proposals initially submitted, without discussion, clarification or modification. In the alternative, college may make the selection of the successful proposal based on negotiation with any of the Offerors.
		2. LC State is not obligated to select the Offeror offering the most attractive economic terms if that Offeror's proposal is not the most advantageous to the college overall, as determined by the college.
		3. LC State will maintain in its files concerning this RFP, a written record of the basis upon which a selection, if any, is made by the college.
	5. **Award**

LC State will award a contract(s) to the high point responsive responsible offeror(s), or whatever is in the best interest of the college.

* + 1. LC State makes no warranty or guarantee that an award will be made as a result of this RFP.
		2. The Offeror(s) deemed to be fully qualified and best suited among those submitting written proposals and/or presentations/demonstrations will be identified based on the evaluation factors stated throughout the response instructions and specification sections. Negotiations may be conducted with any or all Offerors. After negotiations are completed with Offerors, LC State shall select and notify the Offeror(s) which has, in LC State’s opinion, made the best proposal, and award the contract to take effect on the dates negotiated with Offeror(s). LC State reserves the right to judgment concerning quality of service and the Offeror's capability to service the agreement.
		3. Affiliated Institution - Any State of Idaho public higher education institution ("Affiliated Institution") may elect to utilize the Award from this RFP to purchase goods or services from the Awarded Offeror. In the event of such election, the Affiliated Institution agrees to be bound by the terms of this Contract as if it were an original party hereto.
		4. LC State will use commercially reasonable efforts to avoid public disclosure of the contents of a proposal prior to selection of the Offeror.
	1. **Rejection of Proposals**

LC State reserves the right to (i) enter into an Agreement for all or any portion of the requirements and specifications set forth in this RFP; (ii) reject any and all proposals and re-solicit proposals; or (iii) reject any and all proposals and temporarily or permanently abandon this selection process, as the college deems to be in the best interests of the college.

# **ATTACHMENT 1 – OFFEROR QUESTIONS**

RFP #24-0515 Advancement Constituent Relationship Management (CRM) Solution

**Instructions:**

DO NOT IDENTIFY OFFEROR’S NAME OR COMPANY’S NAME OR PRODUCT NAMES OF INTELLECTUAL PROPERTY IN RESPONSES.

ADD ROWS BY HITTING THE TAB KEY WHILE WITHIN THE TABLE AND WITHIN THE FINAL ROW.

The following instructions must be followed when submitting questions using the question format on the following page.

1. DO NOT CHANGE THE FORMAT OR FONT. Do not bold your questions or change the color of the font.
2. Enter the RFP section number that the question is for in the “RFP Section” field (column 2). If the question is a general question not related to a specific RFP section, enter “General” in column 2. If the question is in regards to a Term and Condition or a Special Term and Condition, state the clause number in column 2. If the question is in regard to an attachment, enter the attachment identifier (example “Attachment 1”) in the “RFP Section” (column 2), and the attachment page number in the “RFP page” field (column 3).
3. Do not enter text in the “Response” field (column 5).
4. Once completed, this form is to be e-mailed per the instructions in the RFP. The e-mail subject line should reference RFP number followed by “Questions.”

RFP #24-0515 Advancement Constituent Relationship Management (CRM) Solution

| **Question** | **RFP Section** | **RFP Page** | **Question** | **Response** |
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# **ATTACHMENT 2 – MODIFICATION AND EXCEPTION FORM**

RFP #24-0515 Advancement Constituent Relationship Management (CRM) Solution

**Instructions:** Complete this form and submit with your RFP submittal if you are proposing modifications or taking exception to any of the requirements, terms, or conditions included in the RFP, including any documents incorporated by reference (such as the Standard Contract Terms and Conditions.) See RFP **Section 2.3** for a full explanation of the process surrounding Offeror-proposed modifications and exceptions.

Offerors must specifically address any and all proposed modifications and exceptions. Blanket requests to negotiate requirements, terms, or conditions will not be considered. Offerors must provide an explanation as to why the requirement, term, or condition should be considered non-material. Offeror must also provide a reason for the proposed modification or alternative language, specifically addressing the issues itemized in RFP **Section 2.3.**

The determination of materiality will be made at LC State’s sole discretion. Non-material modifications or exceptions may be negotiated with the apparent successful Offeror, at the discretion of LC State, and as otherwise provided in RFP **Section 2.3**.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| RFP Section | RFP Requirement, Term, or Condition | Reason Requirement, Term, or Condition Should be Considered Non-Material | Proposed Modification, Alternative, or Exception | Reason for Proposed Modification, Alternative, or Exception |
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# **ATTACHMENT 3 – COVER FORM**

RFP #24-0515 Advancement Constituent Relationship Management (CRM) Solution

**(M) Attachment 3, Cover Form must be completed, signed, and submitted with your Proposal.** Failure to complete and submit this form may result in your Proposal being deemed non-responsive.

**Instructions:** The Proposal must include a signed copy of this cover form. Copy and paste this form onto your company letterhead, or include the following information: Offeror’s company name, mailing address, phone number, fax number, e-mail address, and name of Offeror’s authorized signer. The cover form must include the RFP Number and Title and must be signed by an individual authorized to commit the Offeror to the contents of the Proposal.

|  |  |
| --- | --- |
| **Requirement** | **Response** |
| Offeror’s corporate or other legal entity status | [ ]  Corporation [ ]  Limited Liability Corporation (LLC)[ ]  Limited Liability Partnership [ ] Sole Proprietorship [ ]  Other (specify) |
| Offeror’s Tax Identification Number | EIN: |
| Offeror’s DUNS Number | DUNS:  |
| Is Offeror a legal entity with the legal right to contract? | [ ]  Yes [ ]  No |
| Other than modifications/exceptions identified on Attachment 2, in compliance with Section 2.2of this RFP, does Offeror accept, and is Offeror willing to comply with, the requirements of this RFP and attachments, including but not limited to LC State’s Standard Terms and Conditions at <https://www.lcsc.edu/purchasing/vendors>.  | [ ]  Yes [ ]  No |
| Is Offeror in compliance with applicable equal employment regulations? | [ ]  Yes [ ]  No |
| Does Offeror affirm that it has not employed any company or person other than a bona fide employee working solely for the Offeror or a company regularly employed as its marketing agent, tosolicit or secure this contract, and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for the Offeror or a company regularly employed by the Offeror as its marketing agent, any fee, commission, percentage, brokerage fee, gifts or any other considerationcontingent upon or resulting from the award of this contract? | [ ]  Yes [ ]  No |
| Does Offeror understand and agree that for breach or violation of the above term, LC State has the right to annul the contract without liability or, in its discretion, to deduct from the offered price the amount of any such fee, commission, percentage, brokerage fee, gifts, or contingencies.  | [ ]  Yes [ ]  No |
| Firm(s) and/or staff responsible for writing the Proposal | Names: |
| Does Offeror affirm that it is not currently suspended, debarred, or otherwise excluded from federal or state procurement and non-procurement programs? Note: vendor information is available at <https://sam.gov>. | [ ]  Yes [ ]  No |
| Does the Offeror affirm that the proposal will be firm and binding for one hundred twenty (120) days from the proposal opening date and through the duration year one (1) of the contract?  | [ ]  Yes [ ]  No |
| Does Offeror warrant that it does not knowingly and willfully employ persons who cannot legally work in this country; and that Offeror takes steps to verify that it does not hire persons who have entered our nation illegally or cannot legally work in the United States; and that any misrepresentation in this regard or any employment of persons who have entered our nation illegally or cannot legally work in the United States constitutes a material breach and will be cause for the imposition of monetary penalties up to five percent (5%) of the Contract price, per violation, and/or termination of the Contract? | [ ]  Yes [ ]  No |

Signed By:

Printed Name:

Date:

# **ATTACHMENT 4 – COST PROPOSAL**

 RFP # AND TITLE

**(ME) Attachment 4, Cost Proposal must be completed and submitted with your Proposal.** The Offeror must provide a fully burdened rate which must include, **but not be limited to**, all operating and personnel expenses, such as: overhead, salaries, administrative expenses, travel, profit, and supplies. LC State must not be liable to the Offeror for any expenses Offeror pays or incurs unless otherwise agreed to in writing by LC State. Except as set forth in the Agreement, the Offeror must supply, at its sole expense, all staffing, equipment, tools, materials, and supplies to accomplish the services to be performed pursuant to the Contract.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Cost Per Month** | **Quantity**  | **Unit of Measure** | **Fully burdened Cost** |
| Year 1 Service\* | $ | 12 | Month | $ |
| Year 2 Service | $ | 12 | Month | $ |
| Year 3 Service | $ | 12 | Month | $ |
| **TOTAL 3-YEAR COST** | **$** |

\*Year One Service must include implementation

Company Name: \_

Signed By:

Printed Name:

Date:

# **ATTACHMENT 5 – DATA SECURITY/PCI COMPLIANCE**

RFP #24-0515 Advancement Constituent Relationship Management (CRM) Solution

**(ME) Attachment 5, Data Security/PCI Compliance must be completed and submitted with your Proposal, along with documentation specified in this attachment.**

|  |  |
| --- | --- |
| **Requirement** | **Response** |
| Will this product or service have involvement in creating, storing, processing, transmitting, or accessing LC State data or handling financial transactions? | [ ]  Yes [ ]  No |
| If yes, will any data be removed by, accessed from, copied to, or created within systems that do not reside within the geographical boundaries of LC State? | [ ]  Yes [ ]  No |
| If yes, provide a copy of any applicable audit or security assessment reports or certifications such as: SSAE 16, SOC 2, HECVAT, VPAT, and/or ISO 27001 and include copies of any applicable corporate information security policies or other supporting documentation such as disaster recovery plan, incident response plan, etc.  | Title of provided report(s) or certification(s): |
| If an NDA is required for the disbursement of any of these documents or information, provide a copy of the NDA in your response. Check Yes if NDA is required: | [ ]  Yes [ ]  No |
| Will this product or service have involvement in the processing of credit card transactions (Card-Present, Card- Not-Present, Online, Phone-based, or otherwise)? | [ ]  Yes [ ]  No |
| If yes, submit a QSA-signed Attestation of Compliance to the Payment Card Industry Data Security Standards (“PCI-DSS”). Confirm attestation is provided:  | [ ]  Yes [ ]  No |
| If yes, Offeror acknowledges and agrees to the following statements: |
| i. LC State requires that Offeror at all times maintain compliance with current PCI DSS as applicable. Accordingly, the Offeror will be required to provide confirmation of compliance upon request by LC State throughout the contract term. Respondent hereby acknowledges that cardholder data may only be used for execution of the contracted systems or services as described herein, or as required by the PCI DSS, or as required by applicable law. | [ ]  Yes [ ]  No |
| ii. If, during the contract term, offeror becomes aware that systems or services provided under the contract falls out of compliance with PCI DSS requirements, the offeror shall immediately notify the LC State Director of Information Technology.  | [ ]  Yes [ ]  No |
| iii. In the event of a breach, intrusion, or unauthorized access to cardholder data, offeror shall immediately notify the LC State Director of Information Technology to allow for the PCI DSS breach notification process to commence. Offeror shall provide appropriate payment card companies and their respective designee’s access to Offeror’s facilities and all pertinent records to conduct a review of Offeror’s compliance with the PCI DSS requirements. Offeror acknowledges liability for any and all costs resulting from such breach, intrusion, or unauthorized access to cardholder data deemed to be the fault of Offeror. Offeror agrees to assume responsibility for informing all such individuals in accordance with applicable law and to indemnify and hold harmless LC State and its officers and employees from and against any claims, damages, or other harm related to such breach. | [ ]  Yes [ ]  No |