



**HARFORD**  
COMMUNITY COLLEGE  
DEPARTMENT FOR PROCUREMENT

SOLICITATION NUMBER AND TITLE:	<b>RFP 23P-001 CUSTOMER RELATION MANAGEMENT (CRM) SOFTWARE SOLUTION</b>
SOLICITATION DUE DATE AND TIME:	<b>DECEMBER 16, 2022 1:00 PM Local Time</b>
SOLICITATION DOCUMENTS:	<a href="https://hccweb1.harford.edu/procurement/solicitationdocuments.asp">https://hccweb1.harford.edu/procurement/solicitationdocuments.asp</a>
DELIVERY LOCATION OF SUBMITTAL:	<b>HARFORD COMMUNITY COLLEGE PROCUREMENT OFFICE CONOWINGO BUILDING RM 105 401 THOMAS RUN ROAD BEL AIR, MD 21015</b>
VIRTUAL PRE-SOLICITATION MEETING:	<b>NOVEMBER 9, 2022 11:00 AM Local Time</b>
PRE-SOLICITATION MEETING LINK:	<a href="#">Click here to join the meeting</a>
QUESTIONS DUE DATE AND TIME:	<b>NOVEMBER 21, 2022 12:00 NOON Local time</b>
QUESTIONS:	<b>Emailed questions must be received by the date and time noted above to: Beth Bertier, Procurement Assistant at <a href="mailto:bbertier@harford.edu">bbertier@harford.edu</a></b>
ORAL PRESENTATION/DEMONSTRATIONS	<b>Tentatively scheduled January 23-26, 2023</b>

Harford Community College encourages small and minority businesses to respond to and participate in solicitation opportunities.

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RFP 23P-001 CUSTOMER RELATION MANAGEMENT (CRM) SOFTWARE

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GENERAL TERMS AND CONDITIONS  
For ALL Harford Community College purchases

G1) COMPLETE AGREEMENT

These terms and conditions, together with any other documents incorporated herein by reference, constitute the sole and entire agreement between the College and Vendor with respect to the subject matter hereof, superseding completely any oral or written communications unless the terms thereof are expressly incorporated herein. Where Vendor's quotation is referred to, such quotation is incorporated in this document only to the extent of specifying the nature or description of the goods ordered and only to the extent such items are consistent with the other terms herein.

G2) TERMS OF DELIVERY

Delivery terms shall be FOB Destination unless otherwise stated. All prices shall include delivery. Delivery shall be made in accordance with the solicitation specifications. The College, in its sole discretion, may extend the time of delivery for excusable delays due to unforeseeable causes beyond the Vendor's control. The College unilaterally may order in writing the suspension, delay, or interruption of delivery hereunder. No charge will be allowed for cartage unless prior written agreement. All deliveries must be prepaid and delivered to Harford Community College, Conowingo Building, 401 Thomas Run Road, Bel Air, MD 21015-1627. NO COLLEGE SHIPMENTS OR SIDEWALK DELIVERIES WILL BE ACCEPTED.

G3) PACKAGING

All goods delivered under this agreement shall be packed in accordance with acceptable trade practices. Cartons containing packing list must be so marked. Uncrated or bundled goods must be tagged with waterproof tags. The purchase order number shall be shown on all packing slips, bills of lading and invoices affixed or included with each shipment. No charges may be made over and above an offered price for packaging or for deposits on containers unless specified prior to offer acceptance.

G4) TIME IS OF THE ESSENCE

Time is of the essence in the performance of this agreement. If goods are not delivered or service performed within the time specified herein, or if no time is specified then within a reasonable time, or if any goods or services fail to comply with specifications, the College shall have the right to purchase the goods and services on the open market, and Vendor shall be liable to the College for any excess cost of replacement goods or services over the price shown on this purchase order.

G5) QUANTITIES

The College assumes no obligation for articles or materials shipped in excess of the quantity ordered. Any over

shipments will be subjected to rejection and may be returned at Vendor's expense.

G6) ERRORS IN EXTENSION

Where the unit price and the extension price are at variance, the unit price will prevail. The College may reject a submittal as non-responsive if the unit prices are mathematically or materially unbalanced.

G7) TERMS OF PAYMENT

Unless a payment is unauthorized, deferred, or delayed, payments to the Vendor pursuant to this Contract shall be made no later than 30 days after the College's receipt of a true and correct invoice from the Vendor.

G8) ELECTRONIC TRANSMISSION

Any purchase order, contract, contract amendment or official documents is transmitted by electronic means, such transmission shall have the legal significance of a duly executed original,

G9) INVOICES

Invoices shall be mailed to Harford Community College, Accounts Payable Department, 401 Thomas Run Road, Bel Air, MD 21015 or electronic copies may be emailed to [acctpay\\_finance@harford.edu](mailto:acctpay_finance@harford.edu). The purchase number must appear on the invoice. Failure to comply may result in delay of payment.

G10) TAX EXEMPTION

The College is exempt from Federal Excise and Maryland Sales and Use Tax. Exemption certificates are available upon request. Where a Vendor is required to furnish and install material in the construction or improvement of real property in performance of a contract, the Vendor shall pay the Maryland Sales Tax and the exemption does not apply.

G11) INSPECTION AND NON-CONFORMING GOODS

All goods received shall be subject to inspection by the College. The College shall have a reasonable time within which to inspect the goods and shall not be obligated to inspect goods purchased as spare parts, inventory or for future use until the same are to be used by the College. Excess or defective goods or goods not in accordance with the College's specifications will be held for a reasonable period of time for disposition in accordance with the Vendor's instructions at Vendor's risk and expenses and, if Vendor directs, will be returned at Vendor's expense. If the Vendor fails to cure any defects within ten (10) business days, the College reserves the right to repurchase the items elsewhere and the Vendor shall be liable for any excess price paid for the replacement item, plus applicable expenses. Payment for goods or services furnished or performed by Vendor shall not constitute acceptance by the College, and such payments shall be deemed to have

been made without prejudice to any and all claims the College may have against Vendor. The College reserves the right to test any materials, equipment, supplies, or services delivered to determine if the specifications have been met. Any material that is defective or fails to meet the terms of the solicitation specifications shall be rejected. Rejected materials shall be promptly replaced. All goods are fit for the purpose for which they were sold. U.C.C. as adopted by state law, concerning warranties applies to this purchase order.

G12) WARRANTY

The Vendor expressly warrants that all articles, material and work offered shall conform to each and every specification, drawing, sample or other description which is furnished to or adopted by the College and that they will be fit and sufficient for the purpose intended, merchantable, of good material and workmanship, and free from defect. Such warranty shall survive a contract and shall not be deemed waived either by the College's acceptance of said materials or goods, in whole or in part, or by payment for them, in whole or in part. The Vendor further warrants all articles, material and work performed for a period of one (1) year, unless otherwise stated, from date of acceptance of the items delivered and installed. All repairs, replacements or adjustments during the warranty period shall be at Vendor's expense.

G13) INTELLECTUAL PROPERTY

Vendor guarantees that the sale and/or use of the goods and services offered will not infringe upon any U.S. or foreign patent, trademark or copyright. Vendor will, at their own expense, indemnify, protect and save harmless the College, its Trustees, employees, agents and students with respect to any claim, action, cost or judgment for intellectual property infringement, arising out of the purchase or use of these materials, supplies, equipment or services covered by this contract.

G14) HAZARDOUS AND TOXIC SUBSTANCES

Vendor must comply with all applicable Federal, State, County and local laws, ordinances and regulations relating to hazardous and toxic substances including such laws, ordinances, and regulations pertaining to access to information about hazardous and toxic substances. Pursuant to Occupational Safety and Health Act (OSHA) 29 CFR 1910, where applicable, SDS for the products supplied or used as a result of this contract must be sent to the attention of Coordinator for Campus Operations, Harford Community College, 401 Thomas Run Rd., Bel Air, MD 21015-1627. SDS must identify the contract number under which the products were supplied or used. The successful contractor shall submit Safety Data Sheets on any item requested by the procurement manager or other College official.

G15) MINIMUM SAFETY REQUIREMENTS

The Vendor shall be responsible for initiating, maintaining, and supervising all safety precautions and programs in connection with the work. The Vendor shall comply, and shall secure compliance by its employees, agents, and lower tier subcontractors, with all applicable health and safety laws and regulations, including without limitation, Federal OSHA and equivalent OSHA state regulations, city and county ordinances and codes, uniform fire codes, DOT regulations, and owners' facility rules and regulations. The Vendor shall submit to owner, a copy of its Safety and Health Program for review and shall agree to make necessary changes in order to comply with specific facility rules and regulations if needed. The Vendor shall effectively execute the program elements and maintain the job site in a safe and healthful matter. The Vendor shall provide a safe and healthful environment for its employees and agents as well as the owners' representatives and agents. The Vendor shall report to the owners any governmental inspections or inquiries at the job site. The reasons for the inspection and results of the inspection shall be shared with the owners as soon as possible and no later than the next business day. Oral notification is expected as well as a written report detailing the inspection. All injuries, illnesses, and work-related incidents should be reported to the College immediately but, in no event, later than the next business day after the incident. The Vendor shall fill out an Incident Report and submit to the College no later than 48 hours after the initial incident. The College reserves the right to audit the Vendor safety and health related records and statistical information at any time.

G16) INSURANCE

The Vendor shall maintain such insurance as will indemnify and hold harmless the College for property damage and personal injury, including death, which may arise from the Vendor's or subcontractor's operations under this agreement, or by anyone directly or indirectly employed by the Vendor or subcontractor. The Vendor shall maintain, at a minimum, general liability, worker's compensation, and automobile liability insurance in amounts acceptable to the College. A waiver of Subrogation in favor of Harford Community College is required for Worker's Compensation and General Liability. Coverages and coverage amounts are dependent on solicitation requirements. Insurance coverages and required amounts will be specified in the solicitation documents. Prior to beginning work, the Vendor shall send a certificate of insurance to the College's Procurement Department, and the College shall be named as additional insured on the insurance certificate and all applicable policies.

#### G17) INDEMNIFICATION

The Vendor shall indemnify, defend, and hold harmless Harford County, Maryland, Harford Community College, the Harford Community College Foundation and their respective trustees, officials, officers, directors, employees, agents, contractors, volunteers, successors and assigns from all claims, demands, causes of action, suits, liabilities, judgments, damages, losses, fines, penalties, costs, and expenses that may arise by virtue of any acts or omissions by the indemnifying party, its agents, contractors, or employees. Both parties hereto are subject to the protections of Maryland law, including without limitation, the State Government Tort Claims Act and/or the Local Government Tort Claims Act, and agree that nothing herein shall interfere with the tort immunities or other protections available under Maryland law; and further, the parties are free to assert all defenses that are or may become available to them as a governmental or State agency or otherwise by operation of law. This section shall survive the termination of any Agreement.

The College shall not assume any obligation to indemnify, hold harmless, or pay attorneys' fees that may arise from or in any way be associated with the performance or operation of this agreement. The Vendor shall protect, hold free and harmless, defend and indemnify the College including its officers, agents and employees) from all liability, penalties, costs, losses, damages, expenses, causes of action, claims or judgments (including attorney's fees) resulting from injury to or death of any person or damage to property of any kind, which injury, death of any person or damage arises out of, or is in any way connected with the performance of the work under this agreement. This agreement shall apply to any acts or omissions, willful misconduct or negligent conduct, whether active or passive, including acts or omissions of the Vendor's agents or employees, except that this agreement shall not be applicable to injury, death or damage to property arising from the sole negligence or sole willful misconduct of the College, its officers, agents and employees. Accordingly, the College shall notify the Contractor promptly, in writing, of any claim or action brought against the College in connection with the work under this Contract. Upon such notification, the Vendor shall promptly take over and defend any such claim or action. The College shall have the right and option to be represented in any such claim or action at its own expense. Vendor shall, at all times, keep the College free and clear from all liens asserted by any person, firm or corporation for any reason whatsoever, arising from furnishing of services (whether services, work or labor performed, or materials or equipment furnished) by the vendor.

#### G18) DELAYS; FORCE MAJEURE

In no event shall the College be responsible or liable for any failure or delay in the performance of its obligations hereunder arising out of or caused by, directly or indirectly, forces beyond its reasonable control, including, without limitation, strikes; work stoppages; accidents; acts of war or terrorism; civil or military disturbances; riots; hostile foreign action; government action; nuclear incidents or explosions; acts of God; natural disasters, such as hurricanes, tornados, earthquakes, typhoons, floods, fires or other catastrophic natural event; epidemics or pandemics; interruptions, loss or malfunctions of utilities, communications, transportation or computer (software and hardware) services; or any other act or failure to act by the other party or such other party's employees, agents, or contractors. The Vendor shall be liable for delays due to its fault or negligence. In the event of any excusable delay, the date of performance may be extended for a period equal to the time lost by reason of such delay, on written approval of the Director of Procurement. An equitable financial adjustment may be negotiated between parties for any period of nonperformance.

#### G19) CHANGES

The College retains the unilateral right to order in writing, changes in the work within the scope of the contract. No change which increases rates or affects levels of service shall be made unless a signed change order is issued to the Vendor by the College's Procurement Department, incorporating such change and agreeing to the rate increment or revised service. If any changes cause an increase or decrease to the Vendor's cost of, or change in the time required for performance, an equitable adjustment shall be made, and the contract shall be modified in writing accordingly. No claim by the Vendor for an equitable adjustment hereunder shall be allowed if asserted after final payment under this contract.

#### G20) DISPUTES

Any disputes arising under this contract which is not disposed of by agreement shall be decided by the President of Harford Community College or designee. Pending final decision of the dispute, the Vendor shall proceed diligently with the contract performance. Nothing hereunder shall be interpreted to preclude the parties from seeking, after completion of the contract, any and all remedies provided by law.

#### G21) ARBITRATION

Any controversy or claim arising out of or relating to this contract, or the breach thereof, shall be settled by arbitration administered by the American Arbitration Association in accordance with its Arbitration Rules including the Optional Rules for Emergency Measures of Protection, and judgment on the award rendered by the

arbitrator(s) may be entered in any court having jurisdiction thereof. If a dispute arises out of or relates to this contract, or the breach thereof, and if the dispute cannot be settled through negotiation, the parties agree first to try in good faith to settle the dispute by mediation administered by the American Arbitration Association under its Commercial Mediation Procedures before resorting to arbitration, litigation, or some other dispute resolution procedure. If they do not reach such solution within 60 days, then, upon notice by either party to the other, all disputes, claims, questions, or differences shall be finally settled by arbitration administered by the American Arbitration Association in accordance with the provisions of its Commercial Arbitration Rules

#### G22) SUSPENSION OF WORK

The College, unilaterally, may order the Vendor, in writing, to suspend, delay, or interrupt all or any part of the contract for such period of time as he may determine to be appropriate for the convenience of the College.

#### G23) TERMINATION FOR CONVENIENCE

The College may terminate all or any part of the purchase order, contract, or these terms and conditions for any reason at the College's convenience upon thirty (30) calendar day's written notice to the Vendor. The College will pay all reasonable costs associated with this contract for satisfactory work completed prior to termination and any reasonable costs associated with termination. Upon such termination Vendor agrees to waive all claims for damages, including those for loss of anticipated profits and to accept as its sole remedy for termination the value of all work performed prior to the termination and reasonable costs occasioned by termination. The College shall have no liability whatsoever for goods which are Vendor's standard stock.

#### G24) TERMINATION FOR DEFAULT

If the Vendor has not performed, or has performed unsatisfactorily, or failed to provide acceptable form of current Certificate of Insurance, or acceptable form of bond (if required), the College may terminate the contract by written notice to the vendor. Written notice shall specify the act(s) or omission(s) of vendor to cause termination. The College shall pay for satisfactory performance for work completed prior to notice of termination, minus cost of any damage caused by Vendor's breach. If the cost of Vendor's damages exceeds any final compensation due, the Vendor will remain liable and the College may collect costs owed to it. Failure on the part of the Vendor to fulfill contractual obligations shall be considered just cause for termination of the agreement and the Vendor is not entitled to recover any costs incurred by the Vendor up to the date of termination.

#### G25) TERMINATION FOR NON-APPROPRIATION

Harford Community College is a public institution of higher education and its budget is subject to funding by governmental entities. If funds are not appropriated or otherwise made available to support continuation in any fiscal year succeeding the first fiscal year, this Contract shall be terminated automatically as of the beginning of the fiscal year for which funds are not available. The Vendor may not recover anticipatory profits or costs incurred after termination. The effect of termination of the Contract hereunder will be to discharge both the Vendor and the College from future performance of the Contract, but not from their rights and obligations existing at the time of termination. The Vendor may not recover anticipatory profits or costs incurred after termination

#### G26) TERMINATION FOR INSOLVENCY

If the College has reasonable cause to believe the Vendor is insolvent, or if any petition in bankruptcy or under any law for the relief of debtors is filed by or in respect of Vendor, then, at the option of the College, the agreement shall immediately terminate. In no event shall the agreement become an asset in any such proceeding nor shall the College be bound hereby after any act of bankruptcy by Vendor. Any delay by the College to exercise the right to terminate under this section shall not diminish or waiver that right.

#### G27) NON-COLLUSION

Vendor certifies that is has neither agreed, conspired, connived or colluded to produce a deceptive show of competition in the compilation of bid or offer being submitted herewith. Vendor also certifies that it has not in any manner, directly or indirectly, entered into any agreement, participated in any collusion to fix the bid price or price proposal of the Vendor or offeror herein or any competitor, or otherwise taken any action in restraint of free competitive bidding in connection with the contract for which the bid or offer is submitted.

#### G28) VENDOR SUSPENSION OR DEBARMENT

The Vendor certifies that is not suspended or debarred from participating in any State of Maryland or Federal contract awards.

#### G29) INDEPENDENT CONTRACTOR

The Vendor agrees and understands that the services performed are done so as an Independent Contractor and not as an employee of the College and that the Vendor acquires none of the rights, privileges, powers or advantages of College employees. The Vendor is required to pay Federal and State taxes. The College shall not be responsible for withholding taxes with respect to the Vendor's compensation. The Vendor shall have no claim against the College for vacation pay, sick leave, retirement benefits, social security, worker's compensation, health or

disability benefits, unemployment insurance benefits, or employee benefits of any kind.

**G30) NON-HIRING OF EMPLOYEES**

No employees of the College, or any Department, Commission, Agency or branch thereof whose duties as such include matters relating to or attending the subject matter of this agreement shall, while being employed, become or be an employee of the Vendor or subcontractor on this contract.

**G31) BACKGROUND INVESTIGATIONS FOR VENDORS**

As a condition of award of this contract, all Vendors and subcontractors who will be working (this includes attending meetings) on the College campus or any other site leased, owned or used by the College, may be required to provide proof of a successful background check upon award of the Contract. This includes, but is not limited to, verification of credentials, criminal history, and driving records (as appropriate). The College reserves the right to request documentation from the successful Vendor and subcontractor for proof of their ability to work in the United States.

**G32) NON-DISCRIMINATION**

The Vendor agrees:

a) not to discriminate in any manner against an employee or applicant for employment due to age, race, color, religion, sex, creed, national origin, marital status, ancestry, gender, genetic information, physical or mental handicap unrelated in nature and extent so as reasonably preclude the performance of such employment, status as an individual with a disability, veteran, sexual orientation, or any other status as protected by law; and

b) to inform and instruct its employees that all forms of sex discrimination, sexual harassment and sexual misconduct are expressly prohibited, that employees who have been or are being subjected to sex discrimination, sexual harassment or sexual misconduct or who are aware of another who has been or is being subjected to such actions shall immediately notify Vendor's management, that retaliation for reporting any such conduct is expressly prohibited and that the Vendor will take timely and appropriate action against any of its employees who commit such prohibited acts; and

c) above the provisions (a) and (b) above apply in any subcontract for standard commercial supplies or raw materials; and

d) to post and to cause subcontractor to post in conspicuous places to employees and applicants for employment, notices setting forth the substance of this clause.

Failure to comply with the terms of this section shall be considered just cause under Termination for Default

**G33) COMPLIANCE WITH THE IMMIGRATION REFORM AND CONTROL ACT OF 1986**

Vendor warrants that both the Vendor and/or any subcontractor of the Vendor do not and shall not hire, recruit or refer for a fee, for employment under this contract or any subcontract, an alien knowing the alien is an unauthorized alien and hire any individual without complying with the requirements of the Immigration Reform and Control Act of 1986, as amended from time to time (hereinafter referred to as "IRCA"), including but not limited to any verification and record keeping requirements. Vendor agrees to indemnify and save the College, its trustees, and/or employees harmless from any loss, costs, damages, or other expenses suffered or incurred by the College, its trustees and/or employees by reason of the Vendor's or any subcontractor of the Vendor's noncompliance with "IRCA." Vendor agrees to defend the College, its trustees and/or employees in any proceeding, action or suit brought against the College, including but not limited to administrative and judicial proceedings, arising out of or alleging noncompliance of the Vendor with "IRCA". Vendor recognizes that it is the Vendor's responsibility to ensure that all certifications and verifications as required by law are obtained and maintained for the applicable time period.

**G34) AFFIRMATIVE ACTION NOTICE**

Vendor is notified that they may be subject to the provisions of 41 CFR Section 60-300.5(a); 41 CFR Section 60-741.5(a); 41 CFR Section 60-1.4(a) and (c); 41 CFR Section 60-1.7(a); 48 CFR Section 52.222- 54(e); and 29 CFR Part 471, Appendix A to Subpart A with respect to affirmative action program and posting requirements. All vendors and subcontractors shall abide by the requirements of 41 CFR 60-741.5(a). This regulation prohibits discrimination against qualified individuals on the basis of disability, and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities, and 41 CFR 60-300.5(a). This regulation prohibits discrimination against qualified protected veterans and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified protected veterans.

**G35) POLITICAL CONTRIBUTION DISCLOSURE**

Vendor shall comply with §§14-101-14-109, of the Election Law Article of the Annotated Code of Maryland, which requires that every person that enters into contracts, leases, or other agreements with the State, a county, or an incorporated municipality, or their agencies, during a calendar year in which the person or business receives in the aggregate \$200,000 or more, shall file with the State Board of Elections a statement disclosing contributions in excess of \$500 made during the reporting

period to a candidate for elective office in any primary or general election.

**G36) FINANCIAL DISCLOSURE**

The Contractor shall comply with State Finance and Procurement Article, §13-221, Annotated Code of Maryland, which requires that every business that enters into contracts, leases or other agreements with the State or a state unit and receives in the aggregate \$200,000 or more during a calendar year shall, within 30 days of the time when the \$200,000 is reached, file with the Secretary of State certain specified information to include disclosure of beneficial ownership of the business.

**G37) REGISTRATION**

Per the Annotated Code of Maryland, Corporations and Associations Article, all businesses formed in Maryland must be registered with the State Department of Assessments and Taxation.

**G38) FOREIGN BUSINESS REGISTRATION**

Pursuant to §7-202 et seq. of the Corporations and Associations Article of the Annotated Code of Maryland, corporations not incorporated in the State shall be registered with the State Department of Assessments and Taxation, before doing any interstate or foreign business in this State.

**G39) ASSURANCE OF NON-CONVICTION OF BRIBERY**

The Vendor hereby declares and affirms that, to its best knowledge, none of its officers, directors or partners and none of its employees directly involved in obtaining contracts has been convicted of bribery, attempted bribery or conspiracy to bribe under the laws of any college, any state, or the Federal Government.

**G40) MARYLAND PUBLIC INFORMATION ACT**

The Vendor recognizes that the College is subject to the Maryland Public Information Act of Title 4 of the General Provisions Article of the Annotated Code of Maryland. Vendor agrees that it will provide any justification as to why any material, whole or in part, is deemed to confidential, proprietary information or trade secrets and provide any justification of why such materials should not be disclosed.

**G41) AUDIT**

The Vendor shall permit audit and fiscal and programmatic monitoring of the work performed under any contract issued. The College shall have access to and the right to examine and/or audit any records, books, documents and papers of Vendor and any subcontractor involving transactions related to this agreement during the term of this agreement and for a period of three (3) years after final payment under this agreement.

**G42) RECORD RETENTION**

The Vendor shall retain and maintain all records and documents relating to this Contract for three (3) years after final payment by the College hereunder or any applicable statute of limitations, whichever is longer, and shall make them available for inspection and audit by authorized representatives of the College at all reasonable times.

**G43) COMPLIANCE WITH LAWS**

The Vendor agrees to comply, at no additional expense, with all applicable executive orders, Federal, State, County, regional and local laws, ordinances, rules and regulations in effect as of the date of this agreement and as they may be amended from time to time. The Vendor shall obtain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations.

**G44) MARYLAND LAW**

This agreement shall be construed, interpreted, and enforced according to the laws of the State of Maryland.

**G45) VENDOR'S PRESENCE ON CAMPUS**

The Vendor or Vendor's subcontractor will be required to have proper identification showing Vendor's or subcontractor's name and technician name at all times while on campus. The Vendor agrees that all employees whose duties bring them upon the College's premises shall abide by its rules, regulations and the reasonable directions of its officers in enforcing rules, regulations and in internal security and theft control. The College shall have no responsibility for loss, theft, mysterious disappearance of, or damage to, equipment, tools, materials, supplies and other personal property of vendor or its employees, subcontractors, or materialmen. Vendor's employees shall have the right to use only those College facilities necessary to the performance of the contract. Such employees shall comply with the College's policy of: **No Tobacco Use of Any Kind on Campus including private vehicles.**

**G46) NDAA COMPLIANCE**

If this contract involves the purchase of telecommunication equipment or services, the Vendor represents and warrants that it is compliant with the John S. McCain National Defense Authorization Act ("NDAA") for Fiscal Year (FY) 2019 (Pub. L. 115-232) and the interim rule amending the Federal Acquisition Regulation to implement Section 889 of NDAA. The Vendor represents and warrants that it will not provide covered telecommunications equipment or services, as defined by NDAA, to the College in the performance of any contract, subcontract or other contractual instrument resulting from this agreement. After conducting a reasonable inquiry, the Vendor represents and warrants that it does not use covered telecommunications equipment or



services, as defined by NDAA, or use any equipment, system, or service that uses covered telecommunications equipment or services.

G47) CONFIDENTIAL AND SENSITIVE INFORMATION

All Vendors that work in the proximity of Confidential and Sensitive Information (CSI) must agree to abide by the College's identity theft prevention policies and procedures. In the event that the service provider becomes aware of a red flag or data incident, the service provider is required to report the incident to their point of contact at the College. All Vendors that process, store or transport CSI provided by the college are required to give the College sufficient documentation to assess the provider's data security risk.

G48) ASSIGNMENT

The Vendor shall not assign or subcontract, in whole or in part, its rights or obligations under any contract without prior written consent of the College. Any attempted assignment without said consent shall be void and of no effect. Assignment of Accounts Receivables may be made only upon written notice furnished to the College

G49) SUBCONTRACTORS

Vendors are solely responsible for the performance of their subcontractors. Subcontractors, if any, shall be identified and a complete description of their role relative to the Vendor and their performance shall be stated. The College reserves the right to reject any subcontractor. Nothing contained in these documents shall create any contractual relationship between any subcontractor and the College. Prior to receiving the final payment of a project, the Vendor shall certify in writing that payments to subcontractors have been made from the proceeds of prior payments, and that from the Vendor shall make final payment to its subcontractor(s) and suppliers in a timely manner in accordance with its contractual relationship with them.

G50) PUBLICITY

The Vendor shall not in any way or in any form publicize or advertise in any manner the fact that it is providing services to the College without the express written approval of the College, obtained in advance.

G51) RESERVATIONS

The College reserves the right to accept or reject any and all submittals in whole or in part, received as a result of any solicitation; to waive minor technicalities, or to negotiate with any or all responsible Vendors, in any manner necessary, to serve the best interest of the College. Further, the College reserves the right to make an award in whole, in part, or no award at all.

The College reserves the right to reject the submittal of a Vendor who, investigation shows, is not currently in a

position to perform the contract, or who has previously failed to perform contracts of similar nature in a proper and timely manner.

The College reserves the right to make such investigation as it deems necessary to determine the ability of the Vendor to provide the required services, and the Vendor shall furnish to the College all such information for this purpose as they may request. Should such investigation or evidence fail to satisfy the College that the Vendor is fully qualified to execute and complete the contract, the submittal may be rejected.

The College reserves the right to increase or decrease the quantities for which it is soliciting offers hereunder.

G52) SEVERABILITY

If any term or condition of this contract is held invalid by any court, such invalidity shall not affect the validity of other terms and conditions of this contract.

HARFORD COMMUNITY COLLEGE  
FORMAL SOLICITATION (RFP/IFB/RFQ)  
TERMS AND CONDITIONS

Formal Solicitation Terms and Conditions are in addition to the General Terms and Conditions

**FS1) SOLICITATION ADVERTISEMENT AND SOLICITATION DOCUMENTS**

Harford Community College solicitations are posted on the eMaryland Marketplace Advantage website, [www.procurement.maryland.gov](http://www.procurement.maryland.gov), for public notification only.

The Harford Community College's Procurement Bid Board is the only official repository of solicitation documents and any addenda, if posted. It is incumbent on Vendors to monitor Harford Community College's Procurement Bid Board to ensure that they have received the correct information, complete documents and any addenda. The College assumes no responsibility for verbal communications. Failure to monitor Harford Community College's Procurement Bid Board may result in a non-receipt of important information prior to the due date which may result in the rejection of a submittal.

Harford Community College's Procurement Bid Board may be accessed [here](#) or via the following link: <https://hccweb1.harford.edu/Procurement/solicitationDocuments.asp>.

**FS2) ADDENDA**

Should any vendor find discrepancy in the solicitation documents, or should the vendor be in doubt as to their meaning or intent of any part thereof, the vendor must, prior to questions due date and time, request clarification from the Director of Procurement in writing, who will clarify via a posted addendum on the Harford Community College Procurement Bid Board. All posted addenda shall form a part of the contract. The College will assume no responsibility for oral communications. Posted addenda must be acknowledged in the appropriate area of the solicitation submittal. Failure to acknowledge posted addenda may render the submittal as non-responsive.

**FS3) FORM OF SUBMITTAL**

Each submittal must be tendered in a securely sealed envelope, prominently marked with the solicitation number and title, the due date and time, and the name of the vendor. Required submittal documents must be completed in ink and signed by a person authorized to bind the vendor to a contract, if offered. Only original wet signatures or digitally certified electronic signatures will be accepted. Solicitation responses via email or facsimile shall not be accepted. When pricing is requested in both words and figures, the sum written in words shall govern in the case of any discrepancy. The College shall not pay any expenses incurred in the preparation or submission of any solicitation response. The College reserves the right to

consider informal any bid not prepared in accordance with instructions. Conditional or qualified submittals may be rejected.

**FS4) CANCELLATION**

The College may cancel or withdraw any solicitation, in whole or in part, at any time.

**FS5) LATE SUBMITTALS**

Submittals are due according to solicitation requirements. Submittals received after the specified due date and time will not be accepted.

**FS6) SPECIFICATIONS / ALTERNATES COMPLIANCE**

The Vendor shall comply with the true intent of the specifications and not take advantage of any unintentional error or omission, but shall fully complete every part as hereinafter described. Failure to request clarification(s) by the questions due date and time is a waiver to any claim by the Vendor for expense made necessary by reason of later interpretation of the contract documents. Alternate(s) may be offered by the Vendor in their submittal, however, the College reserves the right to reject any alternate(s) and require the specifications to be adhered to as indicated in the specifications.

**FS7) VALIDITY**

Submittals must be valid for a period of one hundred twenty (120) calendar days following the due date. Should there be reasons why the Contract cannot be awarded within the specified period, the time may be extended by mutual agreement between the College and the vendor.

**FS8) WITHDRAWAL**

Submittals may be withdrawn by the vendor at any time prior to the due date and time for the solicitation. Request for withdrawal must be made in writing to the College's Procurement Department.

**FS9) ERRORS IN SUBMITTAL**

Vendors are expected to fully acquaint themselves with all governing laws and ordinances, and inform themselves as to the instructions, terms and conditions, specifications, and other requirements before responding to a solicitation. Failure to do so will be at the Vendor's own risk; relief cannot be secured on plea of error.

**FS10) SOLICITATION DUE DATE**

a) For Invitation for Bids (IFB): Each bid shall be submitted to the Procurement Department at the place specified herein, on or before the day and hour fixed for its receipt or opening. Bids received prior to that time will be securely kept unopened. No responsibility will attach to the College or its representative(s) for premature opening of any bid not secured and addressed as specified above. The Director for Procurement will determine when

the hour fixed for opening has arrived. At the time specified in the IFB document, Bids will be publicly opened and read aloud. No bid received thereafter will be considered. At the public bid opening, no determination of responsiveness or responsibility will be made.

b) For Request for Proposals: Each Proposal submitted shall be securely held until the date and time for the RFP closing. The Director for Procurement shall determine when the time for closing has arrived. No proposals shall be accepted after that time. There will be no public viewing of submitted proposals until after a contract is awarded, subject to Maryland Public Information Act requirements.

#### FS11) PRESENTATIONS

Vendors who respond to College solicitations may be required to make presentations to College representatives, at no expense to the College.

#### FS12) BASIS FOR AWARD

Award may be made to the lowest responsive and responsible vendor(s). In addition to price, consideration will be given to the following when determining the lowest responsive and responsible vendor(s): what is in the best interest of the College; the quality and performance of the goods and services to be supplied; conformity to specifications; delivery time; previous performance; vendor location; references; and other unique requirements outlined in the request.

#### FS13) MULTIPLE AWARD

The College reserves the right to offer contracts to one or multiple vendors. Selected vendor(s) shall be responsible for all products and services required by the solicitation.

#### F14) CHANGES

Contract(s) arising from this solicitation shall not be modified, altered, or changed except by mutual agreement confirmed in writing by an authorized representative of each party to the Contract. No change which increases rates or affects levels of service shall be made unless a signed change order is issued to the vendor by the College's Procurement Office, incorporating such change and agreeing to the rate increment or revised service.

#### FS15) RECIPROCITY

The College is committed to support local businesses when practicable. If a vendor's jurisdiction applies a preference that favors a resident business over a non-resident business, the College may apply a reciprocal preference against the non-resident bidder or offeror in the evaluation of that procurement.

#### FS16) COOPERATIVE PURCHASING

The College reserves the right to extend the terms and conditions of this solicitation to any federal, state, municipal, county, or local governmental agency under the jurisdiction of the United States and its territories. This shall include but not be limited to parochial institutions, special districts, intermediate units, non-profit agencies providing services on behalf of the government, and/or state, community and/or private colleges/universities, and other schools that require these goods, commodities and/or services. This is conditioned upon mutual agreement of all parties pursuant to requirements which may be appended thereto. The vendor agrees to notify the issuing body of those entities that wish to use any contract resulting from this solicitation and will also provide usage information, if requested. A copy of the contract pricing and bid requirements incorporated in the resulting contract will be supplied to the requesting agencies. Each participating jurisdiction or agency shall enter into its own contract with the vendor and this contract shall be binding only upon the principals signing such an agreement. Invoices shall be submitted directly to the ordering jurisdiction for each unit purchased. Disputes over the execution of any contract shall be the responsibility of the participating jurisdiction or agency that entered into that contract. Disputes must be resolved solely between the participating agency and the vendor. Harford Community College does not assume any responsibility other than to obtain pricing for the specifications provided in the solicitation document.

## 1. PURPOSE OF RFP

Harford Community College is seeking proposals to provide a Customer Relation Management software system solution for the Admissions Department as described in Section 10. The College intends to short list proposers based on an evaluation of the submitted technical proposals, and invite short listed proposer(s) in for oral presentations/demonstration. The criteria for evaluating proposals are indicated in section 8.

## 2. TERM OF CONTRACT

The term of the contract shall be for a one (1) year period, with the College having the exclusive option of extending the contract for five (5) additional one (1) year periods under the same terms and conditions.

## 3. BASIS FOR AWARD

The firm(s) with the highest combined technical, demonstration, and prices cores may be recommended to the Harford Community College Board of Trustees for an award of contract. Consideration may also be given to the following when making the award: what is in the best interest of the College; the quality and performance of the goods and services to be supplied; conformity to specifications; delivery time; previous performance; vendor location; references; and other unique requirements.

## 4. ANTICIPATED TIMELINE – (subject to change)

RFP Posted	October 26, 2022	
Virtual Preproposal meeting	November 9, 2022	11:00 AM Local time
Questions due	November 21, 2022	Noon, Local time
Addendum posted	December 2, 2022	
RFP closing date/due date	December 16, 2022	1:00 PM Local time
Technical evaluations	December 19, 2022 - January 6, 2023	
(Winter Break- College Closed)	December 24, 2022 - January 2, 2023	
Committee scoring meeting	January 9, 2023	
Notice of shortlist	January 9, 2023	
Demonstrations/Oral Presentation	January 23, 2023 - January 26, 2023	
Presentation evaluation	January 27, 2023	
Price proposal evaluation	January 27, 2023	
Finalist negotiations	January 30, 2023 - February 15, 2023	
Contract presented to Finance and Audit	February 28, 2023	
Contract presented to Board of Trustee	March 14, 2023 (if required)	

## 5. VIRTUAL PREPROPOSAL MEETING INFORMATION

A virtual preproposal meeting will be held on Wednesday, November 9, 2022 at 11:00 AM local time. The meeting can be accessed via the link below:

[Click here to join the meeting](#)

## 6. INSURANCE REQUIREMENTS

- A. Harford Community College, 401 Thomas Run Road, Bel Air, MD 21015, and its elected or appointed officials, and employees are to be named additional insured,

designated in the Description of Operations Box, and must be listed as the Certificate Holder on the Certificate of Insurance.

- B. Failure to provide, and to continue in force for the life of the contract, the required insurance shall be deemed a material breach of contract. Furnishing of the insurance required herein shall not relieve the Contractor of any responsibilities or obligations assumed under the Contract, or for which the Contractor may be liable by law or otherwise.
- C. Insurance coverage will be evidenced by Certificate of Insurance issued directly to the College and provide thirty (30) days written notice of cancellation or material change in coverage.
- D. It shall be permissible for required liability limits to be met by combination of one or more policies.
- E. Policies for Commercial General Liability insurance must be written to protect the Contractor against claims arising from operations of Subcontractors. Coverages to be included: Broad form property damage, including products and completed operations, independent contractors, and contractual liability coverages previously purchased separately.
- F. Any property or work to be provided by the Contractor will remain at the Contractor's risk until final written acceptance by the College. The Contractor will replace, at his expense, all property or work lost, damaged, or destroyed by any cause whatsoever.
- G. Contractor shall obtain insurance in the specified minimum coverages and for himself and his subcontractor in connection with providing goods and services under this Contract.
- H. The Contractor hereby agrees to indemnify and hold harmless Harford County, Maryland, Harford Community College, the Harford Community College Foundation and their respective trustees, Harford Community College officials, officers, directors, employees, agents, contractors, volunteers, successors and assigns from all claims, demands, causes of action, suits, liabilities, judgments, damages, losses, fines, penalties, costs, and expenses, including courts costs and attorneys' fees, that may arise by virtue of any acts or omissions by the indemnifying party, its agents, contractors, or employees, subject to the limitations the Maryland Tort Claims Act, Section 12-101 et seq. of the State Government Article, Maryland Annotated Code (the "State Government Tort Claims Act"). The College is subject to the protections of Maryland law, including without limitation, the State Government Tort Claims Act and/or the Local Government Tort Claims Act, and agree that nothing herein shall interfere with the tort immunities or other protections available under Maryland law; and further, the parties are free to assert all defenses that are or may become available to them as a governmental or State agency or otherwise by operation of law. This section shall survive the termination of any Agreement.

- I. In the event the Contractor enters into subcontract for the work to be performed, it shall be the obligation of Contractor to require the Subcontractor maintain all insurances specified in the Contract, in like form and amount, and to include Harford Community College and its elected or appointed officials, related entities and employees to be additional insured under Subcontractor's liability policies. All policies of Subcontractor shall be primary and non-contributory, with the exception of Workers' Compensation, to any coverage or self-insurance program available to the College and shall include waiver of each insurer's rights of subrogation in favor of the College.
- J. It is understood that the coverages stated are minimums only. Contractors or Subcontractors may, at their own cost and expense, obtain insurance additional to that required by the College under this Contract.
- K. All required insurance, with the exception of Workers' Compensation, shall be primary and non-contributory to any coverage or self-insurance program available to the College, and shall include waiver of each insurer's rights of subrogation in favor of the College.
- L. The Contractor shall comply with and qualify under current Workers' Compensation laws and at all times cause every Subcontractor who shall be engaged in the work, to comply with and qualify under such laws.
- M. The Contractor agrees that if, by any reason of its failure, or failure of any such Subcontractor, shall be required at any time to pay any sum because any employee of Contractor or its Subcontractor is or shall be considered as the employee of the College as provided in such Workers' Compensation laws, the Contractor shall repay to the College such sums paid by the College.
- N. Evidence satisfactory to the College that the Contractor and each of itsSubcontractors have qualified under the Workers' Compensation laws shall be submitted prior to the commencement of the work contemplated.

**Insurance Coverage Requirements**

Prior to contract execution and during the progress of the work, the Contractor shall provide and maintain the insurance set forth below.

<u>Type of Coverage</u>	<u>Limits</u>
Workers' Compensation and Employer's Liability	Statutory Limits for Maryland \$100,000 per accident \$100,000 disease each employee \$500,000 disease policy limit
General Liability (including bodily injury, property damage, personal and advertising injury	\$1,000,000 each occurrence \$1,000,000 personal & advertising injury

contractual, premises, ongoing operations, products aggregate & completed operations liability)	\$2,000,000 general aggregate per project \$2,000,000 products & completed operations
Business Automobile Liability Insurance (covering owned, hired, and non-owned vehicles)	\$1,000,000 combined single limit
Umbrella Excess Liability (following form of Primary General, Auto, and Employers Liability)	\$1,000,000 each occurrence \$2,000,000 aggregate
Cyber Liability	\$1,000,000 each claim \$1,000,000 aggregate
Professional/Errors & Omissions Liability	\$1,000,000 each occurrence \$1,000,000 aggregate
Third (3rd) Party Crime (dishonest acts of Contractor's employees which results in a loss to the College)	\$250,000 per occurrence

## 7. PROPOSAL FORMAT

Proposals should be prepared simply and economically, providing a straightforward, concise description of the items or services offered. The College will not be responsible for any submittal preparation or submission costs.

Proposal packages must be received no later 1:00 PM (local time) on December 16, 2022 at:  
Harford Community College  
Procurement Department  
Conowingo Building, Suite 105  
401 Thomas Run Road  
Bel Air, MD 21015

Each proposal package must contain two sealed submittals, clearly labeled with the vendor's name and either "Technical Proposal Submittal" or "Pricing Proposal Submittal" as appropriate. The Technical Proposal package must be sealed separately from the Pricing Proposal package.

**TECHNICAL PROPOSAL SUBMITTAL:** The Technical Proposal submittal must be sealed and contain one (1) Original, nine (9) hard copies, and one (1) PDF on a flash drive labeled "technical proposal". This technical proposal submittal should include:

- A brief transmittal letter signed by an officer authorized to bind the form to its proposal
- All items in section 8.A below
- Affidavits must be included with the Technical Proposal submittal

PRICING SUBMITTAL: The Pricing Proposal submittal, sealed separately from the Technical Proposal submittal, must contain one (1) original and one (1) PDF on a separate flash drive labeled “pricing proposal”. Proposed pricing must be submitted on price proposal form provided in this solicitation document.

**8. EVALUATION CRITERIA/ WEIGHTS**

- A. Technical proposal: 60 Points
  - 1. A description of the hosted solution implementation plan including the recommended amount of on-site start-up, training, and technical support services.
  - 2. A description of the on-going remote technical service available to the College.
  - 3. Company profile and references:
    - i. Proposers shall submit a company profile to include, at a minimum: the background and history of the company; size of the company including the number of employees; annual sales volume for each of the past three (3) years, and number of years in the business.
    - ii. Submit three (3) references of similar scope, performed in the past five (5) years, in accordance with instructions on the form provided herein.
    - iii. Proposers must have a minimum of five (5) years’ experience providing the services covered in this RFP.
    - iiii. Proposers must include a minimum of three (3) current references on the form provided. References from higher education customers are preferred and will be awarded additional weight.
  - 4. Answers to Technical Questions (Attachment A).
  
- B. Demonstration/Oral Presentation: 10 points

Proposers should plan to have key personnel attend the oral presentation/ demonstration to include, but not limited to, technical manager, implementation project manager and assigned account manager/team.
  
- C. Pricing Proposal: 30 points

**9. EVALUATION PROCESS**

Step 1: Technical Proposal evaluation: The evaluation committee will review and score all technical proposals. Proposers whose technical proposals scores are in the competitive range, in the opinion of the evaluation committee, will be selected for an oral presentation /demonstration of their proposed product.

Step 2: Oral Presentation: The evaluation committee and selected College stakeholders will review and score presentations at the conclusion of all presentations. Technical Scores and Presentation scores will be tallied. Those combined scores that are in the competitive range in the opinion of the evaluation committee will have their price proposals opened.

Step 3: Price proposals: The proposal with the lowest total price shall be awarded all possible price points. Higher cost proposals will be awarded points prorated from the lowest cost score. All scores will be tallied.



Step 4: Negotiations: The College may negotiate with top rated Proposer. If a mutual agreement cannot be met, The College will go to the next highest proposer to negotiate. This will continue until a mutually agreed upon contract can be found.

## **10. PROJECT SPECIFICATIONS**

### **10.1 Background**

Since 1957 Harford Community College (HCC) has been providing a world-class, affordable education to the residents of Harford County, Maryland. We serve students from a variety of backgrounds: high school students getting a head start on college coursework, established professionals seeking to make a career change or upgrade skills, retirees taking a class for fun and everyone in between. HCC offers more than 90 programs of study that lead to an associate degree or certificate, programs focused on job training and noncredit courses for personal enrichment. HCC is accredited by the Middle States Commission of Higher Education. For the purchase of this solicitation, the Admissions Office is seeking a CRM solution to be used for recruitment, applications and enrollment of students applying to the College's credit programs of study only. HCC's non-credit programs are housed within Workforce and Community Education which operates independently from the Admissions Office. However, we are interested in the possibly of future uses/scaling for other departments.

### **10.2 General Information**

10.2.1 Six Thousand (6,000) credit applications are received each semester between Winter, Spring, Summer and Fall terms.

10.2.2 Credit Application types include:

- a. Dually enrolled high school students
- b. High school graduates
- c. College graduates
- d. Returning HCC students
- e. Transfer students
- f. Visiting/guest students

10.2.3 Students may submit multiple applications over the years. For example: A student applies as dually enrolled high school student then returns as a transfer student then returns again as returning HCC student.

10.2.4 Admissions application for credit students is free.

10.2.5 Program specific applications – Nursing Only: Four hundred forty-nine (449) nursing applications received in 2021 between summer/fall and winter/spring terms. There is an application fee which is currently \$15.00.

10.2.6 Fifteen (15) users/licenses from Admissions and/or Enrollment Management would initially use the product. Staff from IT, including the Help Desk may also need access to the system. Most users would be full or part-time staff with some student workers using a limited version of the product.

10.2.7 The College may be interested in the future scaling up of the system. See section 10.10.

10.2.8 Current products/tools used by Admissions:

- Banner SIS
- Banner Application
- Signal Vine (texting)

- Constant Contact and Office (emails)
- Argos
- HCC website forms (event registration and requests for information)
- SignUp Genius (event registration)
- Microsoft forms (event registration)
- Survey Monkey (event assessment)
- BDMS
- Mitel/Micollab (internal phone system)
- ProvideSupport (chat)
- CollegeBoard (search name purchasing, AP scores, SAT scores, Accuplacer scores)

### 10.3 Application Module Requirements

10.3.1 Multiple application types.

10.3.2 Customizable online application for admission(credit only) to collect application history and recognize students when they complete a new application and input their previously saved data.

10.3.3 Ability to use conditional logic in application questions.

10.3.4 Ability to have tips displayed to external users to assist with application completion.

10.3.5 Ability to customize confirmation messages to applicants.

10.3.6 Student portal in which applicants can manage their own password. Allows students to track their own progress toward admission and enrollment and is customizable by application type.

10.3.7 Ability for students and/or high school counselors to upload documents into the student portal.

10.3.8 Payment processing capabilities.

10.3.9 Creation of unlimited number of applications and forms.

### 10.4 Communications Module Requirements

10.4.1 Responsive option to embed videos, functionality for scheduled and ad hoc communications through multiple forms of media including email, text messaging and postal mail at a minimum.

10.4.2 Centralized communication history with individuals and organizations including but not limited to:

- a. Phone conversations
- b. Emails (both personal and automated correspondence)
- c. Event attendance
- d. In-person and virtual meetings
- e. Mailings and other print materials
- f. Text messages
- g. Chat messages

10.4.3 Ability to create and run multiple campaigns with automated workflow.

10.4.4 Ability to store print materials (ex. Postcards) to be printed and mailed on demand based on specific triggers and/or workflows.

10.4.5 Ability to create and run campaigns based on specific trigger(s).

- 10.4.6 Be able to integrate with email allowing for ability to reply directly to inquiries from mass emails without logging into a separate system or portal.
- 10.4.7 Ability to design and store templates for email and text messages.
- 10.4.8 Ability to send batch email and text messages
  
- 10.5 Events Module Requirements
  - 10.5.1 Unlimited form creation capability.
  - 10.5.2 Customizable forms.
  - 10.5.3 Ability to design and store templates for event registration.
  - 10.5.4 Robust event and management capabilities: robust check-in, mass creation; user-friendly embeddable calendar, built-in surveys/evaluations.
  - 10.5.5 Ability to connect email and text communication to event form submission and event attendance (sending confirmation/reminder messages to event registrants, automatic emails to student based on whether or not they attend events).
  - 10.5.6 Functionality to pre-populate applications and other forms with information already on file for an individual.
  - 10.5.7 Ability to create events with specific timeslot for attendance and ability to create registration cap for timeslots and/or events.
  - 10.5.8 Mobile friendly or have a mobile app event check-in for internal and external users.
  
- 10.6 Reporting/Analytics Module Requirements
  - 10.6.1 Fluid tracking and reporting of students through various stages of recruitment/enrollment funnel: prospect, inquiry, applicant, admit, enrolled student.
  - 10.6.2 Ability to report on events including event history, registration, attendance, application and enrollment status of attendees.
  - 10.6.3 Ability to report on communication outreach including number of messages delivered, number of messages opened by customer, number of links accessed by customer.
  - 10.6.4 Ability to report on application and enrollment history of students connected to communication history.
  - 10.6.5 Detailed reporting and analytics capabilities comprised of both vendor supplied standardized reports and customizable reporting options. Single database with simple UI.
  - 10.6.6 Easily viewed dashboard that can be customized based on users with the ability to track key performance indicators, prospect prioritization and progress toward goals from multiple perspectives including overall institutional outlook as well as individual territory management.
  - 10.6.7 Lead management/inquiry tracking and dashboards.
  - 10.6.8 Ability to run reports on inquiries, applications, and enrollees by school and/or employer and show year over year data.
  - 10.6.9 Ability to share student application progress reports with external partners (i.e. high school counselors).

- 10.6.10 Ability to trigger alerts and/or action items to internal users directing them to students that require follow-up/communication outreach (e.g. staff sees a daily list of students who applied within the last 48 hours to conduct outreach to students).
  - 10.6.11 Ability to provide year-over-year reports related to applications, events, communications.
  - 10.6.12 Reports that can be used to measure return (ROI- based on application yield and enrollment conversion).
- 10.7 Technical and Security Requirements
- 10.7.1 User-friendly, web-based interface that is intuitive for students and campus professionals (faculty and staff)
  - 10.7.2 Single sign-on integration.
  - 10.7.3 Bi-directional integration with Ellucian Banner student information system (SIS) and Banner document management.
  - 10.7.4 Realtime integration with Ellucian Banner SIS
  - 10.7.5 Integration with Signal Vine texting platform
  - 10.7.6 Integration with CollegeBoard Search
  - 10.7.7 Ability to push application, communication, event data from CRM to student's Banner record.
  - 10.7.8 Ability to push information from student's Banner record back to CRM (e.g. registration).
  - 10.7.9 Ability to manage incoming information from a variety of sources through manual entry, web-form entry, and batch importing which maintaining a high level of data integrity/intuitive duplication management, the ability to lock a field.
  - 10.7.10 Ability to store multiple emails in a student record (e.g. personal, campus, parent).
  - 10.7.11 Ability to store parent info within student record.
  - 10.7.12 Ability to associate students with specific schools and/or employer.
  - 10.7.13 Ability for customers to have multiple types of records that are linked together.
  - 10.7.14 Ability to store information for external partners (e.g. high school counselors, community organizers, and employer contacts).
  - 10.7.15 GDPR compliant
  - 10.7.16 Mobile friendly for both internal users and students. Mobile app for internal and external users.
- 10.8 Training, Materials, Support Requirements
- 10.8.1 User access to community hub (similar to Ellucian's hub).
  - 10.8.2 User access to testing environment.
- 10.9 Implementation and Ongoing Support
- 10.9.1 Provide user training.
  - 10.9.2 Provide customer support.

## 10.10 Possible Future Uses and Scaling

10.10.1 The current plan is for the credit-based Admissions office to use the product.

The College may be interested in scaling this product up for use by other departments including: Financial Aid, Registration and Records, Advising, Career and Transfer Services, Non-credit programs (outreach, tracking of external partners, applications and registration), Harford Foundation and Alumni Services. Vendors should include information in their Technical Proposal regarding modules related to the referenced areas as well as any other student facing services.

Procurement Office  
Harford Community College  
401 Thomas Run Road, Conowingo Building, suite 105  
Bel Air, Maryland 21015

**RFP 23P-001 CUSTOMER RELATION MANAGEMENT (CRM) SOFTWARE SOLUTION  
PRICING PROPOSAL**

All proposals must be fully and properly executed, securely sealed, and marked with the number and title of the RFP and the date and time of its opening. Envelopes shall be addressed to the Procurement Office at the address above **no later than 1:00 PM (local time) on December 16, 2022**

To be considered responsive, each submittal must, at a minimum, include the following documents:

**Technical Proposal to include:**

1. Complete proposal narrative (sections 8.A.1 and 8.A.2)
2. Company Profile and References on the form provided; (section 8.A.3)
3. Response to project specifications (section 10);
4. Answers to Technical Questions (Attachment A).
5. Signed affidavits

**Price Proposal to include:**

1. Price Proposal form, completed and signed (separate envelope from the technical proposal);
2. Proposer may attach additional pages to describe other optional fees.

-----  
Firm Name \_\_\_\_\_ DATE \_\_\_\_\_

In accordance with the foregoing Instructions, Terms and Conditions, and Specifications, including Addenda No. \_\_\_\_ through \_\_\_\_, thereto, I/we submit the following for evaluation:

1. FIRM LUMP SUM PRICES

Provide the CRM Software Solution as described herein

- .1 All one-time and upfront costs (first-year costs to implement the system, such as implementation costs, training, setup fees, consultation, travel, licensing, etc.)

\_\_\_\_\_ DOLLARS \$ \_\_\_\_\_  
Words (Figures)

- .2 All ongoing annual costs- years two through five

\_\_\_\_\_ DOLLARS \$ \_\_\_\_\_  
Words (Figures)

TOTAL PRICE PROPOSAL (LINE ITEMS 1.1 + 1.2)

\_\_\_\_\_ DOLLARS \$ \_\_\_\_\_  
Words (Figures)

**Other Fees, if any (explain on a separate attachment)**

2. EXECUTION: The undersigned, duly authorized to bind the named firm, agrees, upon receipt of written notice of acceptance of this proposal within one hundred twenty (120) calendar days after its opening, and to execute the contract in accordance with the proposal as accepted, and to render a certificate of insurance within ten (10) calendar days after notification of award.

_____	_____
Firm	Authorized Signature
_____	_____
Street Address	Typed/Printed Name
_____	_____
City, State, Zip	Title
_____	_____
Telephone	Email

If a corporation please state:

Name of president: \_\_\_\_\_

Name of secretary: \_\_\_\_\_

Under laws of what state incorporated: \_\_\_\_\_

Minority Business Certification: (Please check one)  MBE  WBE  Not applicable

Procurement Office  
Harford Community College  
401 Thomas Run Road  
Bel Air, Maryland 21015

**RFP 23P-001 CUSTOMER RELATION MANAGEMENT (CRM) SOFTWARE SOLUTION  
SOLICITATION AFFIDAVITS**

FIRM

NAME: \_\_\_\_\_

FIRM ADDRESS:

\_\_\_\_\_

**A) NON-COLLUSION:**

I AFFIRM THAT: Neither I, nor, to the best of my knowledge, information and belief, the above firm nor any of its other representatives I here represent have:

- (1) Agreed, conspired, connived or colluded to produce a deceptive show of competition in the compilation of the proposal being submitted herewith; and
- (2) Not in any manner, directly or indirectly, entered into any agreement, participated in any agreement, participated in any collusion to fix the price proposal of the offeror herein or any competitor, or otherwise taken any action in restraint of free competition in connection with the Contract for which this proposal is submitted.

**B) SUSPENSION AND DEBARMENT:**

I AFFIRM THAT: Neither I, nor to the best of my knowledge, information, and belief, the above business, or any of its officers, directors, partners, or any of its employees directly involved in obtaining or performing contracts with public bodies, has ever been suspended or debarred (including being issued a limited denial of participation) by any Federal or public entity, except as follows: (List each debarment or suspension providing the dates of the suspension or debarment, the name of the public entity and the status of the proceedings, the name(s) of the person(s) involved and their current positions and responsibilities with the business, the grounds of the debarment or suspension, and the details of each person's involvement in any activity that formed the grounds of the debarment or suspension)

\_\_\_\_\_

1) The above business was not established and it does not operate in a manner designed to evade the application of or defeat the purpose of debarment pursuant to Title 16, of the State Finance and Procurement Article of the Annotated Code of Maryland; and

(2) The business is not a successor, assignee, subsidiary, or affiliate of a suspended or debarred business, except as follows: (Indicate the reasons why the affirmation cannot be given without qualification)

\_\_\_\_\_

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

By: \_\_\_\_\_  
Signature of Authorized Representative and Affiant                      Printed Name of Authorized Representative and Affiant

Date: \_\_\_\_\_ Federal Employer Identification Number (FEIN): \_\_\_\_\_



Procurement Office  
Harford Community College  
401 Thomas Run Road  
Bel Air, Maryland 21015

REFERENCES

**RFP 23P-001 CUSTOMER RELATION MANAGEMENT (CRM) SOFTWARE SOLUTION**

Each firm must furnish at least three (3) current references, within last five (5) years, that are similar in nature and scope and best represent the proposer's ability to perform the work and meet the specifications and requirements herein,.

1. Firm Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax \_\_\_\_\_  
Contact \_\_\_\_\_  
Email: \_\_\_\_\_  
Project \_\_\_\_\_  
Dates performed \_\_\_\_\_

2. Firm Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax \_\_\_\_\_  
Contact \_\_\_\_\_  
Email: \_\_\_\_\_  
Project \_\_\_\_\_  
Dates performed \_\_\_\_\_

3. Firm Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax \_\_\_\_\_  
Contact \_\_\_\_\_  
Email: \_\_\_\_\_  
Project \_\_\_\_\_  
Dates performed \_\_\_\_\_

PROPOSAL OF: \_\_\_\_\_  
Firm Name

Procurement Department  
Harford Community College  
401 Thomas Run Road  
Bel Air, Maryland 21015

NO PROPOSAL REPLY FORM

**RFP 23P-001 CUSTOMER RELATION MANAGEMENT (CRM) SOFTWARE SOLUTION**

Dear Sir or Madam:

To assist us in obtaining good competition on our solicitations, we ask that each firm that does not wish to respond, state their reason(s) below. This information will not preclude the vendor from responding to future solicitations.

Unfortunately, we must offer a "No Proposal" at this time because:

- \_\_\_ 1. We do not sell the items/services for which proposals are requested.
- \_\_\_ 2. The specifications are either unclear or too restrictive (Please explain in the "Remarks" section.)
- \_\_\_ 3. We cannot submit a proposal because of marketing or franchising policies of the manufacturing company.
- \_\_\_ 4. We do not feel we can be competitive. (Please explain in the "Remarks" section.)
- \_\_\_ 5. Other commitments preclude our participation at this time.
- \_\_\_ 6. We do not wish to participate in the proposal process.
- \_\_\_ 7. We do not wish to respond under the terms and conditions of the Request for Proposal document. Our objections are:  
\_\_\_\_\_  
\_\_\_\_\_
- \_\_\_ 8. We do not wish to sell to Harford Community College. Our objections are: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- \_\_\_ 9. Other: \_\_\_\_\_  
\_\_\_\_\_

Remarks: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Firm Name \_\_\_\_\_  
(PLEASE PRINT)

Authorized Signature \_\_\_\_\_

Attachment A

CUSTOMER RELATION MANAGEMENT (CRM) SOFTWARE  
TECHNICAL QUESTIONS

Please provide answers and requirements as relating to the solicitation document. Indicate the following for each question: System Has; System Does Not Have; Requires Customization with a detailed explanation including if additional costs would be incurred. Indicate if an application module is included in the purchase price or if it will incur additional costs.

**Note: Do not enter costs on this sheet; pricing information is to be included in the price proposal only.**

**APPLICATION MODULE REQUIREMENTS**

- Q1. Does the product have the ability to have multiple application types?
- Q2. Is there a customizable online application for admission (credit only) which collects application history and recognizes student when they complete a new application and inputs their previously saved data?
- Q3. Does the product have the ability to use conditional logic in application questions?
- Q4. Does the product have the ability to have tips displayed to external users to assist with application completion?
- Q5. Does the product have the ability to customize messages to applicants?
- Q6. Is there a student portal which applicants can manage their own initial login/password?
  - a. Does the portal allow students to track their own progress toward admission and enrollment?
  - b. Is the portal customizable by application type?
- Q7. Does the product have the ability for students and/or high school counselors to upload documents into the student portal?
- Q8. Payment processing capabilities
  - a. What types of payment will the system would accept?
  - b. Does the product integrate with payment gateways? Which ones?
  - c. Would this incur an additional cost and/or customization?
- Q9. Is there an unlimited number of applications and forms that can be created?
- Q10. Indicate any system limitations related to making changes to applications and forms.
  - a. Are internal users able to make updates or is vendor involvement required?

**COMMUNICATIONS MODULE REQUIREMENTS**

- Q11. Does the product have a responsive option to embed videos, functionality for scheduled and ad hoc communications through multiple forms of media including email, text messaging and postal mail at a minimum.

- a. Are there any system limitations to using videos and images in communications? Indicate if vendor involvement is necessary to add/edit media communications.

Q12. Does product have centralized tracking of communication history with individuals and organizations including but not limited to the following types of contacts:

- Phone conversations
- Emails (both personal and automated correspondence)
- Event attendance
- In-person and virtual meetings
- Mailings and other print materials
- Text messages
- Chat messages

Q13: Describe how communication is stored for internal users to view in the system.

Q14: Does the product have ability to create and run multiple campaigns with automated workflow capabilities?

Q15: Does the product have the ability to store print materials (i.e. postcards) to be printed and mailed on demand based on specific triggers and/or workflows?

Q16: Does the product have ability to create and run campaigns based on specific date trigger(s)?

Q17: Does product integrate with email allowing for ability to reply directly to inquiries from mass emails without logging into a separate system or portal?

Q18: Does product have ability to design and store templates for email and text messages?

- a. Indicate if product provides templates for email and text messages.

Q19: Does product have ability to send batch email and text messages?

### **EVENTS MODULE REQUIREMENTS**

Q20: Does product have unlimited form creation?

Q21: Does product have customizable forms?

Q22: Does product have ability to design and store templates for event registration?

- a. Indicate if product provides any event form templates.

Q23: Does product have event registration and management capabilities: robust check-in, mass creation, user-friendly embeddable calendar, built-in surveys/evaluations?

Q24: Does product have ability to connect email and text communication to event form submission and event attendance (e.g. sending confirmation and reminder messages to event registrants; automatic emails to student based on whether or not they attend events)?

- Q25: Does product have functionality to pre-populate applications and other forms with information with information that the College already has for an individual?
- Q26: Does product have ability to create events with specific timeslot for attendance and ability to create registration cap for timeslots and/or events?
- Q27: Is product mobile friendly or has a mobile app for event check-in for internal and external users?

### **REPORTING/ANALYTICS MODULE REQUIREMENTS**

- Q28: Does product have fluid tracking and reporting through the various stages of the recruitment/enrollment funnel: prospect, inquiry, applicant, admit, enrolled student?
- Q29: Does product have ability to report on events including history, registration, attendance, application and enrollment status of attendees?
- Q30: Does product have ability to report on communications outreach including number of messages delivered, number of messages opened by customer, number of links accessed by customer?
- Q31: Does product have ability to report on application and enrollment history of students connected to communications history?
- Q32: Is there detailed reporting and analytics capabilities comprised of both vendor supplied standardized reports and customizable reporting options?
- a. Single database with simple UI?
  - b. Is access to system capabilities segmented by security class? For example, is access to system capabilities such as dashboards, report customizations and application edits based on security level?
  - c. Is the ability to run a report limited to only certain users?
- Q33: Is there an easily viewed dashboard that can be customized based on users with the ability to track key performance indicators, prospect prioritization and progress toward goals from multiple perspectives including overall institutional outlook as well as individual territory management?
- Q34: Are there lead management/inquiry tracking and dashboards?
- Q35: Does product have ability to run reports on inquiries, applications, and enrollees by school and/or employer and show year over year data?
- Q36: Does product have ability to share student application progress reports with external partners (i.e. school counselors)?

- Q37: Does product have ability to trigger alerts and/or action items to internal users directing them to students that require follow-up/communication outreach; e.g. staff sees daily list of students who applied within the last 48 hours to conduct outreach to students?
- Q38: Does product have ability to provide year-over-year reports related to applications, events and communications?
- Q39: Are there reports that can be used to measure return on investment (ROI; i.e. based on application yield and enrollment conversion)?

#### **TECHNICAL AND SECURITY REQUIREMENTS**

- Q40: Is product user-friendly, web-based interface that is intuitive for students and campus professionals (faculty and staff)?
- Q41: Does the product have single sign-on integration?  
a. Does your product support CAS as the SSO Integration
- Q42: Is there a robust bi-directional integration with the Ellucian Banner's student information system (SIS) and Document Management System?
- Q43: Is there real time integration with Ellucian Banner SIS?
- Q44: Does the solution use Ellucian Ethos to integrate with Ellucian SIS?  
a. Clearly outline which data us stored in the solution and which data is stored in Ellucian Banner SIS. Include the data that may reside in both systems.
- Q45: Describe the implementation process for integrating the solution with Ellucian Banner SIS.
- Q46: Describe the resources required from the vendor and what is expected to be completed by the College.
- Q47: Does the product integrate with Signal Vine Texting platform?
- Q48: Does the product integrate with CollegeBoard Search?
- Q49: Does product have ability to push information from Banner's record back to CRM (i.e. registration information)?
- Q50: Does product have ability to manage incoming information from a variety of sources through manual entry, web-form entry, and batch importing while maintaining a high level of data integrity/intuitive duplication management and the ability to lock a field?
- Q51: Does product have ability to store multiple emails in a student record (e.g. personal, campus, parent)?

- Q52: Does product have ability to store parent information within the student record?
- Q53: Does product have ability to associate students with specific schools and/or employers?
- Q54: Does product have ability for customers to have multiple types of records that can be linked together?
- a. Students may apply as multiple application types over the years (See section 10.2.3 )
  - b. Students may also have multiple types of contact with the Admissions office e.g. one student can be an applicant, a sibling of an applicant and a parent of an applicant.
- Q55: Does product have information for external partners (e.g. high school counselors, community organizers and employer contacts)?
- a. Describe how these external partners are described in the system.
- Q56: Is the product GDPR (General Data Protection Regulation) compliant?
- Q57: Is product mobile friendly for both internal users and students? Is there a mobile app for internal and external users?
- Q58: Where is the solution hosted?
- Q59: Does your company have one or more Information Security Associations for SaaS Providers?

### **GENERAL QUESTIONS**

- Q60: Provide details on the number of clients you serve that are Community College and the number of clients you serve that use Ellucian Banner for their SIS.
- Q61: Internal Users: How many steps/clicks are involved in most common processing of information, such as logging an interaction or call?
- a. Are screens, labels and other designed features consistent from section to section?
- Q62: Internal Users: What are the different user roles that your system is designed for and what level of “technical savvy” is required for each type of user?
- Q63: Internal Users: What items/sections are considered more advanced?
- Q64: Configurability and Customization: What client-side configurations are necessary/available?
- a. What are the expected resource commitments from the College’s IT department?
  - b. Can the College’s IT department customize terminology to fit our business process?
- Q65: Describe the terminology used in your system for customers (i.e. is the term student used or client)?
- a. How are applications and applicants described?
  - b. How are enrolled students described?

- c. How are prospects and/or inquiries described?
- d. Is Admissions terminology used?

### **TRAINING, MATERIALS, SUPPORT**

In the answers to these questions please indicate if services are available in your system or contracted by a third-party, and/or if the services would incur additional costs.

Q66: Describe user access to community hub; e.g. similar to Ellucian's hub.

Q67: Describe user access in the testing environment.

- a. If this access is limited to certain users, indicate if admissions staff users and College IT staff would have access.
- b. Would the test environment have the ability to integrate with the College's Banner test databases?

Q68: Describe your commitment to client support including:

- a. What types of users can submit a support request?
- b. How are these requests submitted?
- c. Support team hours of operation.
- d. Response rates.
- e. Components of your CRM (if any) that require support from third parties.

Q69: Describe the implementation, training and support services that allow the College to maximize the features of the CRM with built-in training as part of the on-boarding each user type.

- a. Describe on-boarding and implementation process; i.e. how many meetings and hours, meeting location – virtual, at company site or at HCC.

Q70: As part of the implementation process indicate if you will:

- a. Set up our permissions
- b. Import our historical data
- c. Set up our imports and exports
- d. Build our standard queries
- e. Set up our communication flow (e.g. email, text, letters)
- f. Create custom reports
- g. Set up our events
- h. Build our web form(s) [e.g. tour requests, inquiry form]
- i. Build our admissions applications for all student types
- j. Will the College need to purchase third party tools to implement and/or maintain your CRM?

Q71: Describe methods for providing ongoing training and support for new features, functionality and other updates.



Q72: Provide thorough details on expectations for user relationship with product representative; i.e. How many other schools the representative is assigned to work with? How often should the College expect to meet with the assigned representative?

Q73: Does your company provide any professional development opportunities (i.e. annual user conference)?

#### **PRICING STRUCTURE**

Q74: Describe the pricing structure of the product. Is it based on number of users, number of offices using the system, number of applications received each year or other data point.

**Do not include actual pricing/costs in your answer. Any and all costs are to be listed in the price proposal.**

#### **POSSIBLE FUTURE USES AND SCALING**

The current plan is for the credit-based Admissions office to use the CRM product. The College may be interested in scaling this product up to include use by other departments including Financial Aid, Registration and Records, Advising, Career & Transfer Services, non-credit programs: outreach, tracking of external partners, applications and registration, and Harford Foundation and Alumni Services.

Q75: Describe any modules related to the areas listed above as well as other student facing services. Indicate if these additional services and/or modules would incur additional costs.