Request for Proposal

Advancement System for the Green Mountain Higher Education Consortium

RFP #: 2016001

Date: August 10, 2016

Contents

1: Key Information Summary

Title of RFP:	Advancement System for the Green Mountain Higher Education Consortium, RFP #: 2016001
RFP Issue Date:	August 10, 2016
Purpose:	The Green Mountain Higher Education Consortium (Consortium), which consists of Champlain College, Middlebury College and Saint Michael's College, wishes to acquire and implement an integrated system for Advancement.
Procurement Method:	Invited competitive sealed proposals.
Contract Term:	The Consortium anticipates awarding the contract in the first quarter of 2017 and engaging in a 6- to 12-month implementation schedule, with staggered go-live dates, and an ongoing relationship with the selected vendor for maintenance and support.
Issuing Office:	Green Mountain Higher Education Consortium
Issuing Office Point of Contact:	Natalya Boock CampusWorks Inc. Nboock@campusworksinc.com
Deadline for Receipt of Proposals:	September 16, 2016 at 5:00 Eastern Time
Proposal Received at:	Green Mountain Higher Education Consortium Attn: Corinna Noelke 84 S. Service Road, Room 202B Middlebury, VT 05753 AND 1 Electronic copy to: Natalya Boock CampusWorks Inc. 8445 Chesapeake Ave. North Port, FL 34291

This RFP and all of the material contained herein are confidential and the intellectual property of the Green Mountain Higher Education Consortium.

2: About the Green Mountain Higher Education Consortium

2.1: Background Information

The Green Mountain Higher Education Consortium (Consortium) is a newly formed collaborative endeavor of three Vermont Colleges: Champlain College, Middlebury College and Saint Michael's College. The goal of the Consortium is to create and foster collaborative endeavors among member institutions by serving as an agent for economic and educational initiatives that bring value to all. This partnership is determined to find ways to reduce administrative costs while improving services common to all three institutions.

Our vision is to provide excellent resources and services to support all collaborative opportunities with innovative and highly functional systems and management tools that will reduce cost and improve quality by creating better planning and implementation processes.

Champlain College

Founded in 1878, Champlain College is a small, not-for-profit, private college overlooking Lake Champlain in Burlington, Vermont with additional campuses in Montreal, Canada, and Dublin, Ireland. Champlain College offers 29 undergraduate degrees to approximately 2,500 residential students; an additional 3,000+ students are in one of 55 fully online associate, bachelor's, certificate or master's degree programs marketed nationally through direct to consumer advertising and its signature truED® employer partnership program, and recruited via an offsite vendor; and an additional 256 students are in 1 residential graduate program and 5 hybrid (i.e., online and face to face) graduate programs. Its career-driven approach to higher education prepares students for their professional life from their very first semester.

U.S. News & World Report named Champlain College the #1 "Most Innovative School" in the North in their "America's Best Colleges" 2016 rankings. *The Princeton Review* included Champlain in its "Best 380 Colleges: 2016 Edition" and it was also featured in the *Fiske Guide to Colleges 2016* as one of the "best and most interesting schools" in the United States, Canada, and Great Britain.

Statistics
- Over 650,000 individual records in the Advancement database. It is estimated that 30% of those are active records (approx.195,000).
- Average annual number of gift transactions: 3,574
- Alumni of record: 26,836
- FY 16 Cash-In: $4,071,558

Middlebury College

Middlebury College has emerged as one of a handful of the most highly regarded liberal arts colleges in the nation. Middlebury is unique among these schools in that it's a classic liberal arts college that also offers graduate and specialized programs operating around the world.

Middlebury is committed to educating students in the tradition of liberal arts, which embodies a method of discourse as well as a group of disciplines; in scientifically and mathematically-oriented majors, just as in the humanities, the social sciences, the arts, and the languages, Middlebury emphasizes reflection, discussion, and intensive interactions between students and faculty members. Middlebury's vibrant residential community, remarkable facilities, and the diversity of the co-curricular activities and support services all exist primarily to serve these educational purposes.

As a residential college, Middlebury recognizes that education takes place both within and beyond the classroom. Since its founding in 1800, Middlebury has sought to create and sustain an environment on campus that is conducive to learning and that fosters engaged discourse. Middlebury is centrally committed to the value of a diverse and respectful community. Its natural setting in Vermont's Champlain Valley, with the Green Mountains to the east and the Adirondacks to the west, is also crucial to its identity, providing refreshment and inspiration as well as a natural laboratory for research. The beauty of Middlebury's well-maintained campus provides a sense of permanence, stability, tradition, and stewardship. Middlebury has established itself as a leader in campus environmental initiatives with an accompanying educational focus on environmental issues around the globe.

Middlebury's borders extend far beyond Vermont's Addison County. The Middlebury Language Schools, Middlebury C.V. Starr Schools Abroad, Middlebury Bread Loaf School of English, Middlebury Bread Loaf Writers' Conference, Middlebury School of the Environment, and the Middlebury Institute of International Studies at Monterey provide top-quality specialized education, including graduate education, in selected areas of critical importance to a rapidly changing world community. These areas include an unusually wide array of languages, literatures, and culture—including programs in English and writing at Bread Loaf. The first of Middlebury's internationally acclaimed language programs began in 1915, and the Bread Loaf programs were inaugurated in 1920.

Middlebury expects graduates to be thoughtful and ethical leaders able to meet the challenges of informed citizenship both in their communities and as world citizens. They should be independent thinkers, committed to service, with the courage to follow their convictions and to accept responsibility for their actions. They should be skilled in the use of language, and in the analysis of evidence, in whatever context it may present itself. They should be physically active, mentally disciplined, and motivated to continue learning. Most important, they should be both grounded in an understanding of the Western intellectual tradition that has shaped the College, and educated so as to comprehend and appreciate cultures, ideas, societies, traditions and values that may be less immediately familiar to them.

Statistics
- Over 215,000 active records in the Advancement database
- Over 90,000 living alumni
- FY16 Cash-In: over $40 million

Saint Michael's College
Saint Michael's is a Catholic college founded by the Society of Saint Edmund in 1904. Its guiding principles of education, justice and service to the poor are at the heart of the Saint Michael's experience. Saint Michael's mission is to contribute through higher education to the enhancement of the human person and to the advancement of human culture in the light of the Catholic faith.

Saint Michael’s College has earned a number of accolades. It was ranked the 105th best national liberal arts college by *U.S. News and World Report* in 2015, was called one of the “best and most interesting 322 colleges” by the *Fiske Guide to Colleges*, was featured in *The Princeton Review*’s “Best 380 Colleges” and was included in 2015 *Kiplinger’s* “Best College Values in Private Colleges”.

The student body at Saint Michael’s is comprised of 2,000 undergraduate students, 370 graduate students and 137 international students. Of those students, 55% are women and 45% are male. Saint Michael’s students hail from 29 states and 36 countries. The faculty is comprised of 148 full-time faculty members; 91% have a Ph.D. or the highest attainable degree in their field. The average class size is 19 students.

Saint Michael’s offers 36 majors, an honors program, independent research, and internship opportunities. The campus is comprised of 440 acres; minutes from Burlington, VT, and 98% of the students live on campus. Saint Michael’s has 21 varsity athletic teams competing in NCAA Division II.

Statistics
- Over 558,000 records exist in the College’s database with 121,000 making up the Colleague Advancement component
- Average annual number of gift transactions: 7,627
- Alumni of record: 20,500
- FY16 Cash-In: $3,447,160

2.2: Purpose of Proposal

The work of the Advancement offices of the Consortium’s member institutions has evolved and expanded over recent years for all three-member institutions. The advent of new technologies and the growing use of these technologies, combined with ambitious goals for upcoming capital campaigns have prompted Advancement to evaluate current practices. The three institutions have identified key areas that need improvements in the business processes and the software that enables them, including alumni engagement, email communication, events management, prospecting, gift processing, reporting, and constituent management.

The advancement and alumni programs staff for all three member institutions foster mutually beneficial relationships with key constituents, including current students, alumni, friends, donors, business leaders, government officials, the media, and the general public. They are responsible for meeting their respective institution’s fundraising goals as well as delivering alumni events, support, and engagement activities.

The three teams work vigorously to reach ambitious fundraising goals, but their current technology tools consistently hamper their efforts. As a result, it’s challenging for staff to be responsive to needs and agile when opportunities arise because much of their time is spent compensating for inefficiencies. For example, donor listings and reports are difficult to access and time-consuming to produce. Event, donor and gift information is often manipulated manually, which takes a considerable amount of time. Additionally, a great deal of information regarding donors and their preferences is stored in Excel spreadsheets, Word documents, and other shadow systems, not in an easily-accessible shared environment. Remote access to information is complex and inconvenient, and almost no information can be accessed via a mobile environment. The public-facing side of operations is produced by multiple types of software, which causes challenges around user management, data management and duplicate data entry. Timely, regular constituent communications are vital to major goals and strategies, but there are inefficiencies in this process that make it challenging for staff to produce these communications. In other words, staff spend an inordinate amount of time on repetitive tasks rather than transformative efforts.

In order to meet their fundraising goals, the Advancement teams need a software tool that can consolidate their efforts, make operational business processes more efficient and allow users to easily and conveniently access and report on real-time data. The Consortium is seeking an intuitive, modern user interface that provides the ease of use and browser and device agnostic access that the Consortium community would expect from a major commercial website (e.g., Google or Amazon). The desired solution will have reporting and analytics leading to informed decision-making throughout the Consortium's member colleges.

The new system must allow Advancement staff to access real-time prospect, donor and alumni information (including biographical, historical, geographical and relationship data) from any location—whether on campus or remote. The system must also facilitate increased and improved electronic communication with key constituents that are specific, tailored, immediate digital communications throughout the lifecycle of the person's relationship with the institution. It is imperative that the system is able to collect data from and push data into the institution's student system as well to allow key partners such as career services and budget administrators to collaborate with Advancement on managing prospect information, communication to them and next moves for the former and understanding designation of gifts and endowed funds for the latter. The chosen system will provide a seamless transfer of all gift and endowed funds data to the institution's finance system.

Gift officers must be able to manage their portfolios more efficiently and effectively in a user-friendly, intuitive and easy-to-navigate system. All Advancement staff and selective offices across campus such as Career Services and Corporate and Foundation Relations must be able to see a comprehensive profile on each prospect to allow them to leverage the information available to advance their relationships and engagement.

Project Scope

The scope of this project is to purchase and implement a technological solution that can be used by the Advancement Offices of the Consortium's three member institutions. Each institution must be able to securely maintain its own data separately from the other institutions. The proposed system must support the colleges' parent and alumni offices, annual giving, event and volunteer management, principal, leadership, major and planned giving, gift recording, research and prospect management, donor relations and stewardship as well as career services, corporate and foundation relations and grants and sponsored research across all of the institutions independently. The contract awarded to the selected vendor will include the purchase, implementation, and ongoing support of the proposed system. The proposed system will include vendor-provided Payment Card Industry (PCI) compliant credit card, debit card, and electronic check processing and payment gateway using the merchant accounts provided by each of the Consortium institutions. It is highly desirable that the proposed system is cloud-based and vendor-hosted. Currently, the Consortium is also undergoing an RFP for a shared ERP system for its member institutions. Prior to the outcome of that RFP, the proposed system will need to provide a bi-directional interface, preferably native, to both Ellucian Banner (Middlebury) and Ellucian Colleague (Champlain and St. Michael's) student and financial information systems. This may change as the ERP RFP moves forward and would need to be accommodated in your response. This proposal may also include options to meet future requirements. Subsequent contract addendum(s) will cover this additional functionality.

The purpose of this Request for Proposal (RFP) is to invite qualified vendors to submit proposals for the solution(s) described above. While creative future-looking proposals are encouraged, the new system must provide the tools needed to be responsive to increasing demands for accountability by accreditation, funding agencies and regulatory compliance. In order to operate as a single solution ecosystem, the Consortium colleges will seek to reengineer and implement best practices in operations to reduce exceptions in core processes and functions. The implementation of the chosen software systems must also fit within budget limits established by the Consortium.

2.3: Expected Concurrent Users

The Consortium expects as many 1,500 concurrent users of the system across its member institutions. This number includes advancement, grants office and career services staff as well as class agents and volunteers.

2.4: System Advisory Committee

A System Advisory Committee of executives, administrators, staff, and technologists will recommend an advancement solution to the Consortium.

2.5: Technology Platform(s)

The Consortium desires (as much as possible) a cloud-centric approach to application hosting and delivery. It is expected that delivery of the solution above may require a mix of cloud services, infrastructure hosting, and application service providers (ASP). The overarching goal is a total solution that is seamless and operates as a secure, single solution with the ability to configure the software appropriately to meet each college's specific needs. The technology platforms proposed must:

- Be secure, stable and scalable with robust features and functionality.
- Provide intuitive and efficient user experiences for all constituent groups.
- Be web accessible via any device and any browser and preferably responsively designed.
- Include powerful, flexible, web-accessible reporting, dashboards and decision support capabilities.
- Be user-friendly, easy to use, maintain and administer and capable of providing quality training and user documentation for software maintenance and administration.
- Provide bi-lateral integration capabilities with other third-party software, flexibility, data integrity, audit trails and controls.
- Provide support for best practices and self-service features for all constituents.
- Provide users with a real-time, device-agnostic experience from anywhere.
- Be configurable to each institution's individual needs.

- Have the ability to use effective dating and active/inactive type flags.
- Have user definable workflow capability.
- Have the flexibility to extract and import data into/from 3rd party systems.
- Provide at a minimum a Live and Test environment. Live, Test and Development environments would be preferred.
- Has the ability to generate log files that can be disseminated (may not be applicable in a cloud based system).

3: Terms of RFP

3.1: Project Timetable

The key milestones associated with this RFP are as follows:

Project Milestone	Date
Request for Proposal issued	8/10/2016
Intent to bid (not binding) • Notify Natalya Boock at nboock@campusworksinc.com by Noon Eastern Time	8/16/16
Vendor briefing via phone, **required** • Proposals will not be accepted from vendors who do not participate in the vendor briefing. • Conference call information will be provided when vendor's intent to bid email is received.	8/17/2016
Vendors may submit preferred demonstration dates	8/10-9/16
Proposals due	9/16/2016
Vendors notified if selected for demonstrations	10/04/2016
Discovery visits with vendors (optional) Scheduled in advance on select dates in the range • Identify preferred date on preferred demonstration date form	10/10/2016 – 10/14/2016
On-site vendor demonstrations	10/24/2016 – 11/04/2016
Best & final pricing from finalists	11/23/2016
Final review of vendor offerings & vendor selection	11/30/2016
Contract awarded	3/31/2017

3.2: Onsite Product Demonstrations

Semi-finalists will be invited to demonstrate their solutions to the Consortium community. Vendors will be provided with the demonstration requirements by October 7, 2016.

Vendors are welcome to submit their discovery and demonstration date preferences by completing the table below and emailing it to Natalya Boock at nboock@campusworksinc.com. **Vendors may submit this form immediately and separately from the RFP response.** Each vendor that submits date preferences will be assigned discovery and demonstration dates so you may plan for the possibility of being invited to demonstrate your product to the Consortium community. See above for date when all vendors will be notified if they have been selected to demonstrate and what date they have been assigned. Demonstrations will occur on the Vermont campus of one of the member institutions. Different vendors will present at different locations. Date preferences are being gathered as input, but vendors cannot presume their preferred demonstration date will be available.

Discovery & Demonstration Date Preferences Form

Vendor Name:	
Demonstration Dates	**Please rank the dates to the left as to your preference below** 1=Preferred, 2=Second Choice, 3= Third Choice
October 25	
October 27	
November 1	
Discovery Dates Vendors selected to demonstrate their products are given an *optional* one-day onsite discovery with consortium members.	**Please rank the dates to the left as to your preference below** 1=Preferred, 2=Second Choice, 3= Third Choice
October 11	
October 12	
October 13	

3.3: Revisions to the RFP

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

3.4: Good Faith

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

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

3.5: Conflict of Interest

Each vendor shall be considered to have warranted that it has not employed or retained any person, other than a bona fide employee, to solicit or secure the proposed contract; and that it has not paid or agreed to pay any person, other than a bona fide employee, any fee, commission, percentage, gift or other consideration contingent upon or resulting from the award of that proposed contract, or as an inducement to be awarded that contract. Without prejudice to any of its other rights, the Consortium and its member institutions reserve the right to annul any contract or other arrangement entered into with a vendor where there is a breach of this warranty.

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

3.6: Confidentiality

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

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

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

3.7: Staffing

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

3.8: Subcontractors

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

3.9: Expenses

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

3.10: Bonds

The vendor will furnish performance and payment bonds as security for the faithful performance and payment of all of the vendor's obligations of any contract resulting from this proposal. These bonds shall be in amounts at least equal to the contract price and in such form and with such sureties as are acceptable to the Consortium. Prior to the execution of any contract documents, the Consortium may require a contractor to furnish other bonds, in such forms and with such sureties as the Consortium may require. If such bonds are required by written instructions given prior to contract signing, the premiums shall be paid by vendor; if subsequent to contract signing, the premiums shall be paid by the Consortium.

3.11: Insurance

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

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

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

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

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

3.12: Indemnification

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

3.13: Data Ownership

All records or data input into the proposed systems remain the property of the Consortium and its member institutions, without any transfer or reservation of ownership or other rights to the vendor.

3.14: PCI Compliance

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

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

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

Please attest to these PCI requirements.

3.15: Licensing Expectations

The Consortium has the following expectations related to the licensing of the system software:

- The Consortium expects to be billed only for those modules successfully installed, tested and operational, and for the respective pro-rated portion of the annual maintenance contract.
- There will be no increase in license fees or maintenance charges, regardless of the number or extent of hardware upgrades or increases in utilization, for the first five years.
- The Consortium will have a perpetual, non-exclusive license to the software, which will survive any sale or transfer of the vendor's ownership rights.
- Should the contract with the selected vendor cease, the Consortium owns its data and will not be subject to further payment to copy, download, or access its data and/or move it to another system.

3.16: Proposal Acceptance

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

3.17: RFP Included in Contract

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

4: Technical and Functional Requirements

4.1: Emergency Preparedness Plans

Please describe in detail the contingency plans that are in place in the event of a fire or other natural disaster. Will the Consortium's data be backed up in another physical location (i.e., other state)? Is there a secured emergency power source in the event of such a disaster? Also, please list the number of different Internet paths that are in place.

4.2: Business Continuity Plan

Please describe in detail how the Consortium will be serviced in the event of a bankruptcy, foreclosure, merger, buyout or other type of business cessation process by the vendor. Will there be a legal guarantee provided to the Consortium in the event that the vendor ceases to conduct business and/or sunsets the ERP? If so, please detail that guarantee.

4.3: Business Exit Strategy

Please describe in detail the process by which an institution would notify the vendor of their desire to cease using the software. What guarantees are made to the institution? How will the Consortium be serviced? Are tools provided to the institution to extract data needed in a new conversion?

4.4: System Security and Encryption

Please describe your solution's security strategy and encryption methods. Also indicate how security is ensured in both the on-campus and mobile environments. In addition, what options are available to assign and manage user access?

4.5: Document Management Strategy and Integration

Please describe your solution's document management strategy in detail. If document management is not an inherent tool within your solution, please list the preferred vendors that your solution integrates directly with. If there are additional costs for this inherent tool, please provide those costs in Attachment A (as described in section 5).

4.6: Integration Strategy

Please describe your company's integration strategy.
Does your solution provide APIs to access underlying data?
Does your solution provide ETL tools to access underlying data?

4.7: Integration Partners

Please list all 3rd party vendors and their respective systems to which your system integrates. Also detail if those integration services are provided by your company or by the other vendor. If your company provides those services please detail the costs in Attachment A (as described in section 5). Please detail your current integration with the following 3rd party software that are currently used by the colleges:

Document Management: Nolij, Lexmark Content, ImageNow, Softdocs
Communication and Directory Tools: MyEmma, InfoMagic, SiteKiosk, Abila Millenium, iModules, EverTrue
Other Tools: Drupal 7, Online Forms (Ingeniux), PG Calc & Crescedo Pro, Wealth Engine, iWave, Lexis Nexis, Crowdfunding (Useed)
Career Services: Symplicity

4.8: Cloud-Based Scenario

The Consortium is interested in a cloud-based and/or software as a service (SaaS) ERP solution. The production, testing, development, and other available environments should also exist in the cloud.

Please describe the cloud-based options your firm offers. Please provide:

- Brief, high-level description
- Key services that are included
- Proposed service levels and metrics (including measurement calculations)
- Location(s) from where services are provided
- Specifications of where college data will reside (i.e., which state), how that will be guaranteed, and who will have access to the data
- Disaster recovery/business continuity plans and capabilities
- Schedules for backups, upgrades, etc. for options that include regularly scheduled services
- Mechanisms for separating client data and access in shared service environments (shared infrastructure, shared application (i.e., SaaS), etc.
- Management/synchronization process for multiple sites (e.g., production, testing, training, staging, etc.)
- In the SaaS model, please detail guarantees offered in good faith and in place in the event that either party decides to terminate the relationship.

Provide full costs in Attachment A (as described in section 5).

4.9: Hosting Services Scenario

The Consortium is looking for a system that has minimal, if any, onsite hosting requirements. The proposed system should be hosted externally, be cloud-based or be a "software as a service" (SaaS) solution for the production and non-production (i.e., development, testing, training etc.) environments.

Please describe the hosting options your firm is offering (e.g., co-location, application hosting, managed hosting, SaaS, etc.). For each hosting option, provide:

- Brief, high-level description
- Key services that are included
- Proposed service levels and metrics (including measurement calculations)
- Location(s) from where services are provided
- Specifications of where college data will reside (i.e., which state), how that will be guaranteed, and who will have access to the data

- Disaster recovery/business continuity plans and capabilities
- Schedules for backups, upgrades, etc. for options that include regularly scheduled services
- Mechanisms for separating client data and access in shared service environments (shared infrastructure, shared application (i.e., SaaS), etc.
- Management/synchronization process for multiple sites (e.g., production, testing, training, staging, etc.)

Provide full costs in Attachment A (as described in section 5).

4.10: Product Service, Maintenance and Support Capabilities

Provide an overview of your organizations' resources, skills, organization structure, processes, and experience for application support services. Distinguish between general capabilities and those that apply specifically to the products/modules included in your proposed solution. Describe how you provide support to, and interact with, your own hosting organization and/or with third-party subcontract hosting services.

Include onsite response and problem resolution times. You may provide a business model that is utilized in providing support services; this may include documentation that provides steps in quality control and assurance methods.

4.11: Product Support Service Plans

Describe your proposed maintenance and support plan coverage and the various service level commitments and options available to the Consortium. Detail how services are provided in a hosted solution scenario (i.e., application hosted by a third party) and a cloud-based scenario. What services would be provided to the Consortium and what services by the hosting provider? Who is eligible to initiate support calls? Confirm your ability to respond to all service calls within 2 hours. State the location of all support service center(s) in the United States and in Vermont and California. Indicate the numbers and types of trained application software personnel to be utilized to support the Consortium.

4.12: After Hours/Emergency Service Requirements

Departments need to operate beyond regular business hours (8 a.m. EST – 8 p.m. EST). Describe how your solution will provide continuous service that will be available to the Consortium and its colleges, including emergency support calls. An emergency support call is defined as service or troubleshooting repair that must be completed outside of normal business hours or that requires a response time of less than 2 hours.

Provide full costs in Attachment A (as described in section 5).

4.13: Continuing Support, Upgrades and Training Programs

Specify the nature of the proposed post-purchase support to be provided. The following items should be fully explained for problem reporting and resolution procedures, including

- Required reporting method

- Response time requirement
- Hours of operation
- Hotline support, include toll-free access; hours of operation
- Computer online support
- Error Corrections
- Frequency and delivery method of future upgrades and product enhancements
- Documentation updates
- Continuing education—online and classroom and cost of it

Would your firm provide the source code for the proposed solution using any of the following methods?

- No cost with system purchase
- Escrow arrangement
- Purchase agreement
- Other (specify)

Please detail how your company informs their partner institutions about planned system downtime, service availability, and maintenance windows? Also please provide a historical representation from 2015 of planned system maintenance, upgrades and downtime.

4.14: Proposer's Location and Service Center/Technical Support

Provide your firm's office locations and the number of managers, supervisors, seniors, and other professional staff employed at these offices. Explain the technical support available and the escalation process when issues arise.

4.15: Implementation Partners

The Consortium reserves the right to issue a separate solicitation for system integration (SI) services or negotiate SI services with the awarded proposer(s). Please identify all implementation service providers for your proposed solution (i.e. applications/modules) and indicate if they are certified to provide services in the state of Vermont and California. For each service provider, please include:

- A general description of your relationship to the service provider and its history
- Any formal certifications you have provided to the service provider
- Contact information
- Service provider's formal qualifications
- Summary of the service provider's capabilities
- Descriptions of the SI service provider's recent higher education engagements

4.16: Technical and Functional Scenarios and Questions

The technical and functional scenarios and questions are designed to provide the Consortium's System Advisory Committee with the most realistic, scenario-based answers your firm can provide. The Consortium is looking for a technological system that is intuitive and user-friendly; therefore, it is imperative for the System Advisory Committee to understand if your system has the requested capabilities and more importantly, how users will be able to access the data, achieve the level of efficiency capable in your system and the amount of effort required to operate the system. Please note, you must respond to the scenarios provided in addition to the specific functional questions listed below the scenarios. Respond only with functionality that is currently available. However, you may indicate that functionality currently not available to be demonstrated will be available in a future release of the product. If future release, include timing of that release and probability of hitting the current delivery date.

4.16.1 Alumni/Parent Relations

Each of the Consortium colleges maintains an active and robust relationship with its alumni. Access to extensive current and historical data is key to leveraging those relationships.

Please describe how your proposed system would ensure that an alumna or parent, who has multiple residences, is included in the invitation mailing for a regional chapter event planned in their city. How will the alumna's profile be prepared for the college president, who will be attending the event? Will it include all of the alumna's family and business relationships, her volunteer association with the college's career services initiatives through her company, her most recent honor as her city's Chamber of Commerce Citizen of the Year, and a photo of the award presentation along with her giving history (current year and lifetime)? Will it also include the same information for the alumna's parent(s)?

Regarding the proposed system's data management components, please provide detailed explanations of your solution's ability to perform the tasks listed below (including how those tasks are completed by users). Does the proposed solution:

a. Provide the capability to store multiple categorized contact data elements (e.g., residence/employment addresses, email addresses, phone numbers, etc.)?
b. Provide the capability to store unlimited and categorized relationships: person-to-person, person to external organization, person to college business area (e.g., as a volunteer or event attendee)?
c. Provide the capability to enable alumni and parent(s) access to the system to make contact/relationship changes?
d. Provide the ability for a user to choose their preferred language? Is the system able to translate into foreign languages? Use foreign characters? If so, please list which languages the user could choose from and for which languages foreign characters are supported?
e. Provide the capability to organize alumni chapters and parent groups both nationally and internationally?
f. Have the capability to track interactions and add comments to records?
g. Have the capability to integrate with the ERP student system that would provide a seamless transition from current student to alum? Please list the various higher education ERP systems that the proposed solution is capable of integrating with and to what level of integration. If there are additional costs for this integration, please detail those costs in Attachment A (as described in section 5).
h. Have the capability to role the parental information based on the relationship built in the ERP?
i. Have the capability to create an online alumni directory that can be published to the institution's public facing (.edu) website?

j. Have networking tools that would allow alumni to interact with each other through this online tool? If yes, please detail the tools available and how they interact with the proposed solution.
k. Have the capability to illustrate a person's relationship history, their gift giving, notes and activities throughout their relationship with the institution? Please detail.
l. Import data from the current systems? Please detail the how and address the capability to bring that data over by individual transactions.

4.16.2 Parents

The Consortium colleges strive to develop and retain a relationship not only with their students but also with the student's parents. Highly satisfied parents of current students are excellent prospects for financial and volunteer support. They may also have professional connections that could benefit the college in myriad ways. From a technology solution perspective, the initial challenge in creating the parent-student relationship in a database is ensuring that the enrolled student's data is linked to the respective parent's data and that Advancement has employment information for the parent(s). Another challenge is initiating contact with current students' parents without adequate knowledge of the student's status (e.g., active in good standing versus on probation, withdrawn, expelled, etc.).

Please describe how your proposed solution would enable the student-parent relationship and other relevant familial relationships (e.g., grandparents, siblings, other relatives who are associated with the college) to be established in the database. Parent employment data is important not only to Advancement staff for giving potential but also to other areas such as career services. Please describe how your proposed solution would enable cross-functional access to the information necessary for cultivating relationships and soliciting donors and volunteers. For example, does the proposed solution:

a. Provide the creation of a relationship between the student and of the parents independently?
b. Provide the capability to be specific about the type of relationship between the student and parent, stepparent, grandparent, etc.?
c. Provide the capability to populate full employment information, including specific business contact information and position title, for as many parental relationships that might exist?
d. Have the capability to grant selected staff members access to student and parent records in all relevant modules?
e. Provide the capability to update the familial members' records after an individual's record? If yes, would this happen automatically or would the administrator be prompted to approve before the update is made?
f. Have the capability to update address information when residents of the same address need to be updated? If yes, would this happen automatically or would the administrator be prompted to approve before the update is made?
g. Integrate with any address verification software providers? If yes, please list the preferred vendors and any additional costs that would be incurred? If there are additional costs, please detail those in Attachment A (as described in section 5).

4.16.3 Volunteer Management

Volunteers comprise a significant source of assistance to the Advancement team in a variety of ways. The Advancement Offices need to be able to conduct a variety of activities with their volunteers. Please detail your system's capability in terms of registering and identifying volunteers; assigning volunteers to certain donors and prospects; providing volunteers the ability to choose their specific donors and prospects. Does your system:

a. Have the capability to track a volunteer's different activities and services to the institution?
b. Have the capability to feed that volunteer's name and contact information directly to social media tools utilized by the colleges?
c. Have the capability to create triggers to the Advancement staff that there are recognized volunteers in a specific geographical area and/or certain occupation that the staff may want to contact?
d. Have the capability to send an email or printed letter directly through the system to thank the volunteer for their service?

4.16.4 Annual Giving/Annual Fund

Managing an annual fund is similar in many ways to managing leadership/major donors. There is the shared need to track and access prospects' giving history—in detail and summary; by hard, soft and match credit; as an individual and in common with a spouse—and view digitized versions of cultivation and solicitation documentation.

It is equally important to be able to see the results of annual fund initiatives in dashboard format (e.g., progress against goals) and to have the system produce analytical views of the data relative to giving patterns and trends. Phone-a-thons are a major activity that support the colleges' annual funds. Whether conducted in-house or by an outside vendor, accurate prospect data is essential for this initiative to be effective and efficient. If the initiative is being conducted by an outside vendor, the system must allow data to be imported daily. If the call center is campus-based, the system must allow data to be directly entered during the call, support PCI-compliant credit card data entry and be limited by security measures as well as by the caller training.

Please describe how the proposed solution would meet data currency challenges, provide varied views of giving history, display giving data in real-time dashboards, perform predictive analyses of annual fund giving, allow phone-a-thon vendor results to be imported into the system, enable direct caller access for pledge/gift entry during the call and produce college-branded receipts/pledge confirmations. In addition, please answer the questions below and explain how your proposed solution provides the described functionality and how the user would accomplish these tasks. Does the proposed solution:

a. Enable the user to create an unlimited number of document templates in Word format using contribution and donor-specific merge fields?
b. Enable the user to establish system parameters for linking the appropriate documents to specific transactions?
c. Provide the capability to edit, print and/or save the resulting Word documents?
d. Allow the utilization of social media tools like LinkedIn, Facebook, Twitter, Instagram, etc. before, after and during fundraising activities? Detail how?

e. Track activities such as direct mail campaigns, email campaigns, events and other types of activities? Can the reporting tools inherent in the proposed solution provide administrators with data on open, read, click through and response rates, and the success rate of an event or campaign where the success rate is user-defined.
f. Maintain a history of touches upon an individual record?
g. Have the capability to track appeals?
h. Have the ability to segment groups into reporting criteria including the ability to separate married alumni to view their information separately?
i. Have the capability to support crowd-funding activities? If so, please detail how these activities are created, managed and processed in the proposed solution.

4.16.5 Leadership / Major Donor Prospect Management

While mobile access is a priority for all areas of Advancement, nowhere is it more important than in leadership and donor prospect management. Major Giving Officers (MGOs) often spend more time on the road than in the office, thus their success is dependent upon their ability to access prospect data real-time and easily.

Describe how your proposed solution would serve an MGO who is heading out to conduct cultivation and solicitation calls with 10 prospects over the next three days. Because it is nearing the end of the current fiscal year, it is especially important that the MGO has real-time access to each prospect's giving records, in case a gift is processed just before their meeting. As the primary solicitor assigned to each of the 10 prospects, the MGO should receive an alert if a contribution is processed and if the contribution assigns the prospect to a more prestigious giving society. The MGO knows that there may be a forthcoming news release announcing the prospect's promotion and is anticipating an alert from the system if/when said article becomes available.

During the trip, the MGO will conduct solicitation calls with six of the 10 prospects and will rely upon each individual's giving history as well as a system-generated predictive analysis of the dollar level to which they might be asked to stretch. On the second day of the trip, one of the prospects cancels a meeting. Describe how your proposed solution would enable the MGO to find another high-quality prospect in the same geographical area. Finally, describe how the MGO would enter a contact report and prompt a thank you note to be printed on campus and mailed to the prospects or emailed.

In addition to describing how your proposed solution would support the needs described above, please explain how it would provide the following functionality and how the user would accomplish these tasks. Does the proposed solution:

a. Have the capability to view the portfolio of prospects in a 'meaningful' way (i.e., to view a continually updated profile for each prospect)? Please explain how this occurs.
b. Allow for the customization of dashboards by individual users?
c. Have the capability to provide users with a dashboard view of each prospect's relationship life cycle with the college? Please detail how this is presented to the user and the types of dashboards that are available.
d. Provide the capability to automatically assign the next step moves management status for a prospect when the move is based on a new transaction being processed or a contact report being recorded as closed? Please detail the process involved and how it occurs in your solution.

e. Capable of creating automatic alerts to notify the primary solicitor when any actions or changes to a prospect's record occur in the system? Please explain how these alerts are created and maintained.
f. Have the capability to make solicitor assignments in batch for both staff members and volunteers? If so, please detail how this occurs.
g. Have the capability to track the history of solicitor assignments by dates and roles? If yes, please detail how this occurs.
h. Provide the capability for users to see a family-tree-like display of a prospect's connections throughout the college? If so, please detail how this information is presented to the user.
i. Include the ability to integrate wealth-indexing data in the system? If so, please detail how this occurs.
j. Provide the ability to embed digitized articles (print/online) and documents/proposals into a prospect or donor's record? If so, please detail how this occurs.
k. Have the capability to produce an area map by geographical location and other prospect data (e.g., reunion class)? If so, please detail how this occurs.
l. Have the ability to track proposals, letters of intent, gifts, and additional documentation. Is there also the ability to electronically sign documents?
m. Allow documents to be stored and accessed directly in the proposed solution? If not, please detail the proposed solution's ability to link to scanned documents. If yes, would these documents be able to be viewed in a mobile environment?
n. Track progress towards each MGO's individual annual goals? If yes, please detail how the individual's manager would load an individual's goals in the system.

4.16.6 Planned Giving

System functionality related to planned giving management is almost always directly linked to leadership/major donor prospect management, but there are a number of requirements specific to the cultivation/solicitation/stewardship of planned gifts (PG), primarily defined by each of the specific PG vehicles.

One college has a goal of creating long-range anticipated annual revenue projections from existing planned gifts, as a component of its five-year strategic plan. In order to meet that goal, the institution wants to link all existing trust, bequest, and owned life insurance documents to the individual donor's planned giving module records, in addition to populating reportable fields. Another goal is to accelerate the acquisition of new planned gifts through informational seminars at regional gatherings and through an electronic newsletter directed to targeted alumni reunion classes. In order to support the newsletter initiative, the college must be able to report on who has opened and read at least 50% of the content of two of those communications. Describe how your proposed solution would meet the requirements for this project.

In addition, describe how the proposed solution would meet the following planned giving requirements. Does the proposed solution:

a. Have the capability to record and track the progress of each step required to secure a PG? If yes, please explain how this occurs.
b. Have the capability to integrate with financial records to record investment data? If yes, please explain how this occurs.

c. Have the capability to access digitized documents (e.g., bequest documents, trust agreements, annuity contracts)? If yes, please explain how this occurs.
d. Have the capability to track the various PG vehicles' individual requirements (e.g., annuity payment schedules, charitable remainder unitrusts, lead trusts, etc.)? If yes, please explain how this occurs.
e. Have the capability to track reader engagement with electronic PG communications, such as newsletters? If yes, please explain how this occurs.

4.16.7 Events

Event management is another important activity for Advancement. Whether your proposed solution provides 'in-system' event management functionality or integrates with a third-party tool, all required elements must be easily accessible and capable of orchestrating complex events while aligning services, participants, and attendees.

Please describe how your proposed solution could manage the production of invitations for a five-year reunion event for all graduates whose class year ends in 5 and 0. All invitees' records should contain a digitized view of the invitation they were sent, including the full brochure of registration choices and related reminders. The system must accommodate registration, tracking and payment for each of the activities offered during the two-day event—cocktail reception, black-tie dinner seating, orchestra concert seating, football game tickets and brunch—as well as lodging preferences and food preferences for activities that offer meal choices. Registrants are also asked to electronically sign a photo release form for the event. As the event is being planned, the details associated to all vendors—such as contact person/information, service/goods provided, and contracted fees—should be linked to the appropriate general ledger numbers in the college's business office. The registrants also need to be tracked against the facilities' individual capacity.

Current reports on responses and payments should be accessible to users whether they are in the office on their computer or working remotely via mobile device. Finally, after analyzing the after-action report in the system, the event structure should be copied and new dates assigned for classes ending in 1 and 6 for the coming year. Describe how your proposed solution can support the scenarios above. In addition, please detail how the proposed solution is able to integrate social media tools such as LinkedIn, Facebook, Twitter, etc., to advertise the event before, during and after the successful outcome.

Please explain how the proposed solution can provide the following functionality and how a user would accomplish these tasks. Does the proposed solution:

a. Have the capability to assign a batch of records to an event invitation and generate them? If yes, please detail how this occurs.
b. Has the capability to load/view a digitized version of all invitations/response documents? If yes, please detail how this occurs.
c. Have the capability to report the progress of registrations against invitations at any moment in time? If yes, please detail how this occurs.
d. Have PCI-compliant capability to support online and in-person registration and payment for event activities? If yes, please detail how this occurs and if there are additional costs involved.

e. Have the ability to process additional types of payments when staff are out in the field via Square technology or mobile PCI-compliant card swipes?
f. Have the capability to create an ‘umbrella’ event with multiple activities under it and to manage each activity independently and as a component of the larger event? If yes, please detail how this occurs.
g. Allow payments to accommodate quid pro quo needs and integrate with individual giving records accurately? If yes, please detail how this occurs.
h. Have the capability to record attendee preferences/assignments for food, lodging, seating, etc.? If yes, please detail how this occurs.
i. Have the capability to record and track details about vendors who provide facilities/products/services and the costs associated with those? If yes, please detail how this occurs.
j. Allow an after-action report to be created as part of the event record? If yes, please detail how this occurs and what information is available to include in the report.
k. Have the capability to copy the event structure and detail to enable efficiency with annual events? If yes, please detail how this occurs.
l. Have the capability to load attendee information onto the institution’s website or social media tools before, during and after the event?
m. Provide a mobile app that can be created and used for events? If yes, would this app be provided at no cost or would there be a cost for the user to download it?

4.16.8 Corporate/Foundation Grants – Private/Public

The colleges regularly receive grants from foundations, corporations and public institutions. Some grants are referred to as “grants” because the donor is an organization, but these grants are simply outright gifts with no more detail associated to them than a gift from an individual. Other grants have reporting requirements associated with them. It is these reporting requirements and cross-functional connections that comprise the focus of Advancement’s needs.

The first step in preparing a submission to a grantor is matching the college’s need with the foundation or corporation’s defined areas of interest, submission schedule and other criteria. Staff efficiency would increase if the system were able to report on that data. Another opportunity for improved efficiency is a workflow component that enables the proposal to be automatically distributed to relevant staff members for review and editing prior to the final version being accessible within the system. Please detail how your proposed solution would assist grants staff in identifying potential grants that match institutional needs. Explain how grants office staff would track and complete the grant proposal process.

Then, assuming the success of the grant proposal, the cycle continues with the allocation of the funding and population of the reporting schedule with an automatic tickler feature. Describe how your proposed solution would help the colleges manage grants.

In addition, please explain how your solution provides the following functionality and how the user would accomplish these tasks. Does the proposed solution:

a. Have the capability to store and view proposals and grant documents and subsequent reports? If yes, please detail how this occurs and what information can be stored and reported upon.

b. Have capability to create a reporting calendar, including multiple dates, associated to each grant that would launch alerts to the respective Advancement staff member(s)? If yes, please describe this process.
c. Have the capability for cross-functional access by the college's Business Office, Financial Aid Office, and other areas connected to a grant? If yes, please explain how this occurs.
d. Have the capability to store and search on extensive data on granting organizations? If yes, please explain.
e. Have the capability to record and search on individual college grant funding needs/interests? If yes, please detail how this occurs.
f. Have the capability to set an alert based on predefined college criteria that would notify an administrator of a grant fund being overspent or underspent at a certain point in the fiscal year?

4.16.9 Career Services

From an advancement perspective, Career Services' needs are primarily defined by their requirements for accessing student, alumni and parent records—especially employment details. They benefit from the ability to track alumni and parent volunteers and recognize their efforts in mentoring, employment fairs, internships, etc.

The system's ability to integrate with social media (e.g. LinkedIn) enables Career Services to match alumni and parent volunteers with students through their professional interests and/or geographic location.

Career Services at one Consortium college is actively focusing on students who are studying international marketing. Interested students have self-identified, but the challenge for college staff is identifying alumni and parents who have professional ties to the international marketing community and linking the students to them. They are confident that LinkedIn data would be helpful in this initiative, but they do not currently have a way to integrate the two sets of data. Please detail how your proposed solution would assist Career Services staff in identifying students interested in international marketing and alumni and parents who have ties to the international marketing community. Also describe how a geographical representation of how those two groups intersect in a specific region of the United States is produced.

In addition, please describe how your proposed solution would meet the following needs. Does the proposed solution:

a. Have the capability to report on students and their matches with alumni & parents or employers and to pull this information into system based dashboards or another reporting tool? If yes, please detail what information can be pulled into the reports and/or dashboards.
b. Have the capability to integrate/hyperlink students and volunteers to their social media accounts (e.g., LinkedIn, Instagram)? If yes, please detail how this occurs, what type(s) of information can be linked to, and if the person's social media accounts can be automatically updated with their volunteer information.
c. Have the capability to record and track organizational/corporate guidelines for internships and other work experience opportunities? If yes, please explain.

d. Track interaction with a particular employer where students may be working or have internships? Please detail how information on a particular employer is tracked and maintained and how this information interacts with the information tracked, maintained and reviewed by the Advancement office for this employer or alumni, parent, donor working for this employer.

4.16.10 Gift Recording/Records

No advancement activity is more important than accurately recording contributions. Each contribution creates a link among the donor and the donor's details, the amount of the contribution, the fund(s)/designation(s) where the dollars are to be deposited, the payment method and numerous other data points. Advancement staff produce the greatest number of reports based on these records.

Every system has standard gift processing elements as well as additional requirements that are defined by the college. On a standard day, college gift processors (GPs) manage a wide array of activities. Their most common tasks are processing groups of transactions, such as outright gifts, pledges and pledge payments. If the business area requests it, they may need to 'batch' transactions by contribution type, payment method or some other transaction component. They may also need flexibility when assigning a date to the groups, which may require backdating. Please detail how your proposed solution produces batch transactions that can be split by user-defined criteria.

The ability to make demographic changes to donor records without 'breaking out' of the process is critical to the GP's efficiency. For many of the transactions processed, the GP needs to accommodate the donor's wishes for dividing the contribution between or among multiple funds and/or directing it to one or more commemorations. The GP may need to categorize the transaction as a donor advised fund (DAF), as being associated to a specific solicitor, as qualifying for a corporate match, as being associated to a specific appeal, as having one or more soft credit donors populated or another variable that is requested by donors or required by the individual college's procedures. Please detail how your proposed solution can help GPs process these types of transactions efficiently.

GPs often make adjustments to existing transactions, a process that must be both efficient and viewable through an audit trail. The GP's last stop when processing a group of transactions is executing the integration of Advancement processing with the Business Office's general ledger. Please describe how your system would fulfill each of the requirements in the following two categories:

Standard functionalities. Does the proposed solution:

a. Have the capability to create all contribution types: gifts, pledges, pledge payments, recurring donations and actualized gifts?
b. Have the capability to track pledges and gifts anonymously either by transaction, the person or the entire record being anonymous while maintaining the ability to create tax receipts? If yes, please detail how this occurs.
c. Have the capability to track verbal pledges?
d. Have the capability to format donors' names differently based on their gift (i.e., Recognition – Palmer Family and then James Palmer) that could be different depending on the type of campaign? If yes, please detail how this occurs.

e. Have the capability to split any contribution type among multiple donors, designations/funds, payment methods and/or campaigns? If so, please detail how this occurs.
f. Have the capability to define unique payment schedules for pledges? If so, please detail how this occurs.
g. Have the capability to assign multiple solicitors to each contribution type? If so, please detail how this occurs.
h. Have the capability to assign "In Memory of", "In Honor of" and "In Name of" for any contribution? If so, please detail how this occurs.
i. Have the capability to further segment funds/designations according to asset classes, areas of giving, type or purpose and/or contribution categories? If so, please detail how this occurs.
j. Have the capability to link scholarship funds/designations to the financial aid module's award codes for those funds/designations? If so, please detail how this occurs.
k. Have the capability to record scholarship or program criteria to funds/designations and link to primary donors and contacts? If so, please detail how this occurs.
l. Have the capability to produce receipts and acknowledgements that are defined/linked to contributions? If so, please detail how these are set up and maintained.
m. Have the ability to provide mobile, easily accessible information to Gift Officers, Alumni staff and volunteers who are working an event, alumni and donors? Please detail what type of information is accessible in a device agnostic, mobile environment and how security access is created and managed for the various constituencies.
n. Have the capability to assign a person multiple roles (i.e., Student, Alumni, Parent, Donor) that may all need to be active roles and can those specific roles be reported upon individually and/or as a group?
o. Have the capability to provide details in total, by campaign or by transaction over a period of time? If yes, please detail how this occurs.

Consortium requirements. Does the proposed solution:

a. Have the capability to import transactions from outside sources (e.g., iModules) directly onto donor records? If so, please describe the import process and how the donor record is updated.
b. Have the capability to display the original pledge amounts when pledges have had to be written down because of a DAF payment?
c. Have the capability to make demographic changes in an efficient, seamless fashion during contribution entry? If yes, please detail the process.
d. Have the ability to instantly view the distinction between hard, soft and match credit for a donor on a transaction? If so, please detail how this occurs.
e. Have the capability to record transactions that include a quid pro quo element? If so, please detail how this occurs.
f. Have the capability to create an alert on an individual donor record indicating that there is a spouse? If yes, please detail how this alert is created and maintained.
g. Have the capability to create college-branded email receipts produced directly from the system after a gift is recorded? If yes, please detail how these emails are created, edited and maintained. Also, can these communications be reproduced if/when necessary? If yes, please detail the process.

h. Have the capability to freeze a snapshot of a giving record through the reporting functionality (e.g., what a donor’s giving record looked like on a specific date)? If yes, please detail how this occurs.

4.16.11 Research

Each Consortium college relies on significant research efforts that are both outward and inward facing. Staff access as many external public resources as possible to gather prospect data and maintain the accuracy of their data on existing donors. Relevant data typically comes from sources such as print and electronic publications, social media, official records, newsfeeds and more. Once data is identified as applicable to the prospect or donor’s record, that data must be stored in the system in an easily accessible manner. To leverage the full utility of the data, the staff must be able to see the data in context with other information in the record and in its original format, whether PDF, digitized, or video. Please detail the proposed solution’s ability to help Advancement staff to efficiently and effectively manage this process.

Managing research data relies upon many of the requirements previously mentioned. Please describe your proposed solution’s ability to support the following needs. Does the proposed solution:

a. Have the capability to import wealth-indexing data directly onto individual records? If yes, please detail the import process.
b. Have the capability to load and access digitized articles and documents onto individual records? If yes, please detail the import process and explain how user can view those documents.
c. Have the capability to produce a modifiable profile for individuals and organizations (e.g., the selections from a menu format)? If yes, please detail the process and provide a sample profile.
d. Have the capability to capture a snapshot of data and save it to a prospect or donor’s record? If yes, please explain.
e. Have the capability to map prospects according to criteria in addition to geographic data? If yes, please detail the criteria available.
f. Have the capability for the system to change a prospect’s status relative to moves management parameters based on data additions (e.g., contributions)? If yes, please detail how this occurs.
g. Have the capability to conduct keyword searches by scanning text? If yes, please detail how this occurs.
h. Have the ability to add photos to a person’s record?

Other functionalities are more specific to recording and managing research data. Describe your proposed solution’s features and functionality for recording, managing and reporting on research data. Does the proposed solution:

a. Have the capability to enter extensive text-based data? If yes, are there character limits? If so, what are they?
b. Have the ability to automatically populate phrases? If yes, please describe how this occurs and if there are any limitations.
c. Have the ability to include hyperlinks within text? If yes, are there any limitations to this?

d. Have a two-component rating system—capacity and inclination—that would 'read' data from all areas of the system? Does the rating system automatically calculate status changes when new data is added? If yes, please detail how this occurs.
e. Have the capability to automatically import selected individuals' holdings on an annual basis? If yes, please detail how this occurs.

4.16.12 Donor Relations/Stewardship

Donor relations and stewardship require a system with communication functionality that automatically produces receipts, contribution acknowledgements and pledge reminders. While most systems possess this basic functionality, the Advancement offices need a system that can produce pledge reminders in a delivered process based on current contribution data and according to a programmed schedule. To achieve the greatest impact, the system should also be able to produce reminders in various formats, such as letters, emails, postcards etc.

Beyond that fundamental requirement, donor relations and stewardship also report on recognition societies, which are created through automatic assignments that are based on contribution data and matched to societies, according to the college's parameters. They are also responsible for producing an annual stewardship report for donors about designated funds, which is based on data from across business areas. The reports must include cumulative contributions to the fund, investment returns and distribution amounts captured by the finance area, and recipients of those funds from various areas across the college, e.g., financial aid, endowed professorships, internships. Please detail how your proposed solution would produce these types of reports and what the amount of manual effort required is by staff members.

In addition, please describe your proposed solution's features and functionalities that meet the following needs. Does the proposed solution:

a. Provide the capability for donor relations/stewardship staff to access relevant donor and awardee contact information, contribution data, business office investment data, financial aid, internship, etc. office allocation data? If yes, please detail how this information is accessed and viewable by the staff.
b. Have the capability to imbed workflow(s) that launch alerts to appropriately-defined staff members of changes in key elements, e.g., changes in usage criteria, withdrawal of a current student awarded a scholarship, placing a hiatus on distribution from a fund, etc.? If yes, please detail how these alerts are created, maintained and activated.
c. Have the capability to embed workflow(s) that trigger inclusion in a reporting schedule on creation of a new scholarship fund? If yes, please detail how this occurs.
d. Have the capability to create alerts when data elements of a fund are no longer valid, e.g., death of the primary contact? If yes, please detail how these alerts are created, maintained and activated.
e. Have a place in the system to build out and record the strategy for stewardship and/or engagement with a prospect that would then trigger certain activities? If yes, please detail.

Donor Relations/Stewardship staff is also responsible for maintaining donor recognition societies. Please describe how the proposed solution supports the following needs. Does the proposed solution:

a. Have the capability to include a donor in multiple recognition societies? If yes, please detail how this occurs.
b. Have the capability to include or exclude categorizations of matching gift credit? If yes, please detail how this occurs.
c. Have the capability to limit inclusion in a society to individuals or organizations? If yes, please detail how this occurs.
d. Have the capability to automatically assign donors based on contribution entry? If yes, please detail how this occurs.
e. Have the capability to define inclusion or exclusion of soft and matching credit? If yes, please detail how this occurs.
f. Have the capability to assign donors to recognition societies based on consecutive years of giving and to have the number of consecutive years be a retrieval data element? If yes, please detail how this occurs.
g. Have the capability to define how multi-year pledges are used in calculating society inclusion (i.e., based on the total amount of the pledge or on the anticipated payment amount in each of the pledge years)? If yes, please detail how this occurs.
h. Have the capability to allow cumulative giving (lifetime) calculations? If yes, please detail how this occurs.
i. Enable alerts to be sent to defined staff members when donors reach higher levels and/or programs? If yes, please detail how this occurs.
j. Have the capacity to include a constituent (alumni, parent, friend, etc.) in a recognition society that is not based on giving? For example, to combine all class leaders, event hosts, alumni chapter leaders, chapter event hosts and social media ambassadors into a Volunteer recognition society.
k. Automatically assign individuals to such a society based on information entered in other parts of the system? For example, in the process of setting up an alumni event, staff indicate that the alumnus is hosting the event at their home. By coding them as the "host" will they automatically be added to the aforementioned volunteer recognition society?

4.16.13 Reporting

Any system's reporting functionality is expected to include delivered reports with system-defined, minimally modifiable report components and ad hoc reports that can be produced from an embedded reporting solution or linked tool, like Informer or Argos.

Advancement, Accounting, Budget, and Career Services staff members may have daily needs for varied reporting formats. For example, an MGO may begin the day with a need for an ad hoc report to provide two year-to-date figures—total cash-in and pledge balance to be fulfilled by close of the fiscal year—data she wants to reference when speaking with a prospect at a breakfast meeting. Later in the day, the MGO needs a dashboard analysis of the giving patterns for her top 10 prospects in the Eastern region as she prepares to visit each of them. That evening, she will be speaking at a reunion class gathering and needs up-to-date giving figures for the group. Please detail how the proposed solution would enable the MGO to produce these reports. Does the proposed solution have built-in functionality to produce these reports? What format can they can they be produced in? Can the reports be downloaded into MS Office/PDF? Can they be emailed directly from the solution?

Please detail the proposed solutions delivered reporting functionality and how that functionality will effectively and efficiently support offices. Does the proposed solution:

a. Have the capability to display Advancement data in a dashboard? Do those dashboards include functionality to display progress against goals and/or moves along a continuum? If yes, please describe how the individual user can create the dashboard(s) and how they are displayed.
b. Enable reporting across business areas (e.g., Donor Relations/Stewardship staff can access Business Office data and/or Financial Aid Office data)? If yes, please describe how these types of reports would be created and maintained.
c. Have the capability to express data elements in common language rather than code? If yes, please explain.
d. Have the ability to report by population segments within the reporting tool provided? Please detail.

5: Requirements for Proposal Response

This section delineates requirements for engaging with the Green Mountain Higher Education Consortium personnel and preparing and submitting a proposal response.

5.1: General Instructions

Vendor personnel may not make contact with or visitation to any Green Mountain Higher Education Consortium or college personnel unless specifically invited by the Consortium or CampusWorks. Effective August 10, 2016, contact and questions about this RFP or the Consortium must be channeled through CampusWorks. Please direct queries to:

Natalya Boock
CampusWorks Inc.
Nboock@campusworksinc.com

Any oral information received from any Green Mountain Higher Education Consortium or College staff member or member of the System Advisory Committee will not alter or change this RFP.

By responding to this RFP the proposer acknowledges that he/she has read and understands the information contained in this RFP and its attachments and has taken the contents into account in the preparation of the proposal costs as well as alternate proposal prices.

The cost for developing the proposals shall be absorbed by the vendor. Green Mountain Higher Education Consortium considers all terms and conditions to be accepted unconditionally by the vendor unless written exceptions are made to specific clauses. Such exceptions may; however, be used as a basis for rejection of the proposal. Failure of a vendor to follow the instructions of the RFP may result in rejection of the vendor's proposal.

5.2: Submission Instructions

Vendors must provide

- One (1) hard copy of the proposal
    - Sent to Green Mountain Higher Education Consortium
- Two (2) USB drives with electronic copies of the proposal
    - 1 sent to Green Mountain Higher Education Consortium
    - 1 sent to CampusWorks

Please direct completed proposal (1 paper and 1 electronic) to:
Corinna Noelke, Executive Director
Green Mountain Higher Education Consortium
84 South Service Road, Room 202B
Middlebury, VT 05753

802-443-2304

Please direct proposal on 1 USB drive to CampusWorks to:
Natalya Boock
CampusWorks Inc.
8445 Chesapeake Ave
North Port, FL 34291
941-735-7130

Green Mountain Higher Education Consortium and CampusWorks must receive both electronic media and paper copies, as described above, by 5 p.m. EST on September 16, 2016.

Withdrawal of bid proposals will be accepted until the bid proposal submission time and date stated above. No bid proposals may be withdrawn after the deadline. Proposals shall be irrevocable for 180 days following the proposal due date. Proposals will be assumed to be competitive, subject to due diligence and negotiations.

Omissions, evasions, alterations, additions, or irregularities of any kind may constitute sufficient cause for rejection of a proposal without further consideration. Green Mountain Higher Education Consortium is not liable for interpretations and misinterpretations or other errors or omissions made by the vendor in responding to this RFP.

5.3: Questions About the RFP

Vendors should review the proposal prior to the vendor briefing on August 17, 2016. Vendor questions will be captured and addressed, as much as possible, during that session. Questions that cannot be addressed in that session will be answered in writing to all vendors by August 25, 2016.

5.4: Vendor Presentation and Demo

The Consortium will require a demonstration of the proposed solution's capabilities via in-person oral and visual presentations for all semi finalists. Demonstrations may be recorded for evaluation purposes only.

5.5: Required Format

The proposal should be submitted electronically in either Microsoft Word or Adobe PDF format, arranged in the following prescribed order. The proposal **should not reference costs** except in Attachment A.

Section 1 – Cover Letter: Briefly explain why your solution and company are the best fit to meet the Consortium's needs as specified in this RFP. The letter shall also acknowledge any addenda to the RFP that were received and communicate any exceptions to the RFP. The letter shall contain the title of the solicitation, include the vendor's name, federal tax identification, and address and shall be signed by an individual who is authorized to bind the firm to all statements, including the services and prices contained in the proposal.

Section 2 – Executive Summary: Please provide an executive summary that is three pages or less.

Section 3 – Company Information: Please provide an overview and history of your company, including at least the following information:

a. **Name:** Provide the company legal name, address, and telephone number.
b. **Legal structure:** Describe the legal structure of your company.
c. **Leadership:** Provide details about your company's leadership in all key areas. Include an organizational chart showing the line of authority, including individual names and titles.
d. **Staffing:** Provide details about your company's staffing, including employee retention rates by job category.
e. **History:** Explain your corporate history, length of time in higher education, and the number and type of higher education clients you serve.
f. **Mission:** Describe your corporate mission, vision and long-term strategic initiatives.
g. **Strategy:** Explain your product strategy and roadmap for the next release
h. **Plans:** List and describe any major development plans and initiatives for the next three years related to the scope of this RFP, including strategy for the next two releases.
i. **Other products:** List and describe other products, beyond those listed in this proposal that may benefit the Consortium and its member colleges.
j. **Lawsuits:** List and describe all current and/or pending lawsuits.
k. **Awards:** List and describe recent awards or acknowledgements your company has received.
l. **Comparables:** Describe your company's history of working with organizations similar in size and complexity to the Consortium and its member institutions.
m. **Fit:** Explain what makes your company uniquely qualified to fulfill the Consortium's needs.

Section 4 – Client References: Provide at least five (5) client references that match the Consortium's profile as closely as possible (see the Section 2: About Green Mountain Higher Education Consortium) and have licensed the proposed solution in a comparable environment. For each client reference provide, at a minimum, the client name, a contact name, title, address, e-mail address, phone number, institutional enrollment, list of software licensed, implementation status and hardware and database environments. Also, provide information on clients who have either cancelled or discontinued use of any part of the vendor's system or maintenance agreement within the past five years. Finally, if bidding a SaaS/IaaS option, please provide contact information for comparable clients using your hosted solution.

Section 5 – Proposed Staffing: Describe the staff that will be assigned to work with the Consortium throughout the implementation process and beyond. Include information about the corporate organization, experience, and skills related to your track record, reputation, and past client performance that indicates your capability to successfully implement the proposed systems services. Provide examples of similar major projects that demonstrate experience, qualifications, innovative solutions and skill sets that enabled you to perform the necessary tasks.

Provide an organizational chart to facilitate the identification of key individuals that will be assigned to the application solution and any proposed subcontractors for the consortium. Include professional resumes for proposed staff and subcontractors identified in the organization chart. Identify the proposed project manager, hosting service manager, primary support personnel, and other key resources that the consortium will be relying upon.

Section 6 – Proposed Project Plan and Schedule: Provide a detailed discussion of the recommended plan for implementation of the software systems being proposed, fully explaining how you plan to implement the proposed system within the context of other systems currently in use and considering the need to integrate and/or interface with these systems so as not to disrupt the colleges' day-to-day operations. The preliminary written project plan should clearly articulate project management methodology and contain clearly marked milestones and deliverables for all phases of the project. The plan shall describe how and when each implementation stage will be accomplished, timeframes for training and meetings, data conversion techniques and expectations, testing and live cutover, and status reports and issue resolution.

Section 7 – License Conditions: Specify the terms and conditions for using the licensed software proposed in response to this RFP. Include the license documents for all software, installation, and maintenance services.

Section 8 – Statement of Work/ Technical Details: As requested in Section 4: Technical and Functional Requirements, please respond to each scenario and delineate the scope and detailed descriptions of all work the vendor will perform to fulfill the contract.

Section 9 – Implementation and Training Services: Provide a detailed description of all implementation and training services included with the system. Include example training materials and user manuals.

Section 10 – Customer Service and Support: Provide a detailed description of the ongoing customer service and support services that will be provided to the Consortium and its member colleges as part of its ongoing maintenance agreement.

Section 11 – Service Level Agreement: Provide a detailed description of the proposed Service Level Agreement that the consortium would enter into.

Section 12 –Vendor Viability and Vision: Provide an overview of your organization, your partner organizations (if you are using subcontractor partners to provide any of the requested functionality) and proposed applications that include the following information:

a. Your organization's financial viability.

b. If you are a finalist for this procurement, will your company's audited financial statements available for review by the Consortium?
c. Your current rating by Moody's and S&P.
d. Understanding of the higher education industry and ability and commitment to meet its evolving needs. Please provide corporate profile details about your company's experience in this market niche, such as year founded, how many years providing technological systems for higher education, total number and type of employees, etc.?
e. Describe your company's involvement in, and commitment to, the higher education industry in Vermont, the United States, and globally.
f. Does your company implement new strategies and technologies without making current application software obsolete? Please explain.
g. Are your research and development activities focused on meeting emerging client requirements? If so, what is the process used to determine priorities for new developments and system enhancements?
h. What is the number of your new clients who purchased a full system or major portion of a full system in 2016? 2015? 2014? How many clients are fully operational on the version of the system you are proposing? How many are still in some phase of the implementation process?
i. Stability and viability of the proposed applications/products/services.
j. Provide the following information regarding the ownership of your firm to eliminate any potential conflict of interest:
    1) If sole proprietorship – owner's name
    2) If partnership – owners' or partners' names
    3) If corporation – president and chief executive officer, senior officers, and major shareholders
    4) Provide confirmation that no consortium system advisory committee member, board member, or employee is also an employee of the proposing organization.
k. Provide documentation of your organization's structure, describing the various business units, subsidiaries, etc.
l. Provide an overview of your product portfolio.
    1) Describe the functional and technical evolution of your proposed current release version/solution over the past 3-5 years. Include the initial roadmap plans and identify the outcomes, including general availability dates in comparison to the initial plan. Also, identify additional improvements implemented that were beyond the roadmap.
    2) Provide a roadmap of your proposed solution's planned evolution for the next 2-3 years. Describe your processes for developing/evolving your product roadmap.
    3) Are there active user groups dedicated to your solutions? Please provide information regarding user groups, indicating their meeting locations, size of the group(s), and frequency of their meetings and communications. Are user groups affiliated with your company or do they operate independently? Does your company sponsor user group meetings? Do they allow outside, third-party vendors to participate in the meetings even if at a cost, or are outside vendors, who may not have partnership deals with your company, prohibited from participating?

4) How do you evaluate and adjust your services based on client input and needs?
5) Are you continually developing new implementation methodologies to meet client demands? Please provide examples.
6) How do you use advances in technology to improve the efficiency and effectiveness of your service and support staff? Please provide examples.
7) How do you make sure your service and support staff are dedicated to developing long-term relationships with each client?
8) What, if any, Consortium-type private institutions are supported by your proposed solution?

Section 13 – Pricing: The following separate documents should also be submitted with the proposal:

a. **Attachment A—Estimated Cost of Five-Year Ownership:** Complete and submit as an Excel spreadsheet and accompanying Word document (labeled "Attachment A – Costs") for text responses. Additional rows may be added to the Excel sheet, if needed, to accurately reflect all of the costs that Green Mountain Higher Education Consortium will assume over a five-year period.
b. GMHEC is requesting pricing for the consortium as a whole not by individual consortium member.

6: Evaluation and Selection Process

6.1: Proposal Evaluation

Proposals should address all sections of this RFP with sufficient detail to allow the System Advisory Committee to evaluate the proposal. Evaluation criteria will focus on the following factors, among others:

- **Functionality** as documented in the RFP response and observed via demonstration and experience.
- **Technology** as documented in in the RFP response and observed via demonstration and experience.
- **Total cost of ownership** over a five-year period, including anticipated internal costs.
- The quality and quantity of **professional services** and support offered by the vendor during implementation and beyond.
- The vendor's long-term **financial viability** and stability.
- The vendor's **corporate strategy**, including mission, vision, growth, and product roadmap.
- **References** from other higher education institutions for which the vendor has provided similar products and services.

The Consortium reserves the right to verify the information received in any proposal submitted in response to this RFP. If the information cannot be verified, the Consortium reserves the right to downgrade its evaluation of the proposal. If a vendor knowingly and willfully submits false performance or other data, the Consortium reserves the right to reject that proposal. If it is determined that a contract was awarded as a result of false statements or other data submitted in response to this RFP, the Consortium reserves the right to terminate that contract immediately and seek damages.

6.2: Proposal Selection

The Consortium reserves the right to:

- Reject any and all proposals with impunity.
- Withdraw or reissue this RFP prior to the awarding of a contract or extend the time for proposal submittal by the issuance of an addendum.
- Remedy any technical errors in this RFP.
- Revise this RFP (see "Revisions to the RFP" under "General Information").
- Waive all technicalities, irregularities and deviations from this RFP.
- Request any additional information and clarification from the bidding vendors.
- Disseminate information received from the vendor to others whom the committee deems, in its sole discretion, to have an interest in the proposal, but in no event shall the System Advisory Committee be liable for any breach of confidentiality.
- Decide whether a proposal does or does not substantially comply with the requirements of this RFP.
- Act as sole and final judge as to which proposal, if any, is the best overall.
- Negotiate with all potentially qualified vendors in an effort to serve its best interests.
- Award a contract to the bidder whose proposal is considered to be in the best interest of the Consortium.

- Award a contract without discussion or negotiation if it determines that such an award will result in fair and reasonable pricing and would be the most advantageous to the Consortium and its member colleges.
- Reject the proposal of any bidder who refuses to enter into a contract after it has been awarded.

This RFP does not obligate the Consortium to accept any proposal, negotiate with any vendor or award a contract in response to this RFP.

6.3: Best and Final Offers

If it is deemed in the best interest of the Consortium, qualified vendors may be permitted to revise their initial proposal by submitting a best and final offer. The Consortium shall notify each qualified vendor of the scope of the requested best and final offer and shall establish a date and time for their submission. Green Mountain Higher Education Consortium may require more than one series of best and final offers and discussions if it is determined that it is in the Consortium's best interest to do so. If more than one best and final offer is requested, a vendor's immediate previous offer shall be construed as its best and final unless the vendor submits a timely notice of withdrawal or another best and final offer.