

Vermont State Colleges
Request for Proposals
Athletic Customer Relationship Management Tool
Issue Date: February 16, 2024

Proposals due: March 1, 2024
5:00 PM Eastern Time

1.0 Organizational History

1.1 General Information

The Vermont State Colleges (VSC) is comprised of two member institutions – Community College of Vermont (CCV) and Vermont State University (VTSU). The system educates over ten thousand Vermonters and non-Vermonters each year, employs over three thousand Vermonters, and in Spring 2020, graduated over eighteen hundred Vermonters and out-of-state students into the workforce with certificates and degrees.

1.2 Mission Statement

For the benefit of Vermont, the Vermont State Colleges system provides affordable, high quality, student-centered and accessible education, fully integrating professional, liberal, and career study.

This integrated education, in conjunction with applied learning experiences, assures that graduates of VSC programs will:

1. Demonstrate competence in communication, research and critical thinking;
2. Practice creative problem-solving both individually and collaboratively;
3. Be engaged, effective, and responsible citizens;
4. Bring to the workplace appropriate skills and an appreciation of work quality and ethics;
5. Embrace the necessity and joy of lifelong learning.

The Vermont State Colleges system provides continuing educational opportunities for individuals to meet their specific goals.

2.0 Introduction

The athletic departments within Vermont State University invite proposals for implementing new comprehensive athletic CRM software. This sought-after solution should seamlessly integrate (API) with our existing Admissions system (Slate) and accommodate four separate athletic departments within one single Slate instance. Our primary goals include ensuring athletic compliance for the lifecycle of all student-athletes from recruitment through their alumni years. The proposed system should efficiently manage data from our four campuses to a unified Slate instance for student-athlete applicants. To promote collaboration and information sharing between coaches, athletes, and staff members, a robust communication module within the system is also a key objective. We look forward to receiving comprehensive proposals that contribute to the enhancement of our recruiting, compliance, and communication capabilities.

3.0 Requirements

The following is a listing of the key functional requirements for the Athletic Customer Relationship Management Tool RFP. VSC will measure individual submissions against these.

3.1 General requirements

1. Team Management Features

- Customizable CRM tool for collecting, organizing, and displaying prospective and current student-athlete information
- Ability to easily transition prospective student-athletes to rostered student-athletes

2. Comprehensive Athletic Compliance Features:

- Monitoring of 38 team activities within the applicable compliance rules
- Athletic calendar for tracking athletically related activities and days used per sport limitations
- An administrative portal housing the tools for completing all compliance-related tasks
- Digital distribution and collection of compliance forms and customizable eligibility tracking and reporting system

3. Integration with Slate:

- Automated data synchronization for four athletic department CRMs into one single instance of Slate.
- Scheduled automated information flow between systems
- Guided implementation plan for set up and continued long-term support between Athletics CRM and Slate

4. Communication Module:

- Dynamic messaging and notification system between prospective and current student-athletes, Athletic Department staff, coaches, Admissions, and Registrar staff.
- Activity tracking for communication history
- Ability to communicate with students involved in the work-study program
- Automated communication for simplifying administrative tasks

5. User-Friendly and Accessible Interface:

- Intuitive and easy-to-use design
- Support for mobile, tablet, and laptop interfaces
- Fully accessible interface that is compliant with Section 508 and/or WCAG 2.1 AA

6. Platform Design

- Cloud-based (Software as a Service)
- SAML 2.0 single sign-on support with granular user access control.

4.0 Qualifications, References, and Pricing

4.1 Qualifications and References

Provide a description of the qualifications and experience of your company. Include responses to the specific required items listed below:

Bidder Profile and Qualifications

- Name, mailing address, email address, and telephone numbers of company.
- Number of years in business.
- Number of employees in Vermont and nationally.
- Number of colleges and universities in which the product is installed and maintained by the bidder.
- Location of your data center.
- Please provide a complete HECVAT Light Version (<https://www.ren-isac.net/public-resources/hecvat.html>).

Bidder References

You must demonstrate experience and capability in the installation and maintenance of the proposed solution by providing evidence of successfully completing projects of similar size and scope. Please provide at least three customer references, with the following information:

- Customer name and location
- Contact person(s): name, title and telephone number
- Your project manager for the engagement
- Product installation date
- Number of years you have maintained the system

By submitting your proposal, you understand and agree that the VSC may make any investigations it deems necessary to determine your ability to perform the work. You agree to furnish the VSC with all such additional information and data for this purpose, as the VSC may request.

4.2 Pricing

Your proposal should include all of the charges, and it should clearly state the pricing structure along with the types of products and/or services accompanying each price. The VSC expects fully bundled pricing for each service offered and any tiered pricing or volume purchasing discounts/rebates that maybe available due to purchasing loads.

4.3 Terms

- 4.3.1 Please provide 36 & 60 month-term options on all pricing, unless otherwise noted. Please clearly indicate any discounts associated with respective terms.

4.4 Taxes/Fees

- 4.4.1 Please note any and all proposed taxes, fees, or charges.
- 4.4.2 The VSC is exempt from sales and use taxes. Submitted proposals shall not include these taxes. The College's tax-exempt number will be provided to the selected bidder. Please clearly note these exemptions in your proposal.

5.0 RFP Instructions, Requirements and Information

This section provides information on how to contact the VSC for questions, deadlines, the selection process, legal and insurance requirements, and other general business matters.

5.1 Questions about this RFP

Please submit your questions to the VSC on or before February 23, at 5:00 PM Eastern Time. All questions will be posted on the VSC website, www.vsc.edu, and made available to all bidders. The contact information for questions:

<i>Name</i>	James Thivierge
<i>Title</i>	Assistant Athletic Director for NCAA Compliance
<i>Email address</i>	james.thivierge@vermontstate.edu

5.2 Deadline and Delivery

The deadline for submitting responses is 5:00 PM Eastern Time, March 1. Provide an electronic copy **only, via email**, to:

<i>Name</i>	James Thivierge
<i>Title</i>	Assistant Athletic Director for NCAA Compliance
<i>Email address</i>	james.thivierge@vermontstate.edu

5.3 Selection Process

Method of Award

VSC will base the evaluation of each proposal to this RFP on its demonstrated competence, compliance, format, cost, and enterprise applicability. This includes, but is not limited to, product availability, quality, prices, service availability, timing, and delivery. The purpose of this RFP is to identify those vendors having the interest, capability, and financial strength to supply the VSC with an athletics CRM solution. If the VSC does not identify a suitable bidder within the RFP process, the VSC is not obligated to award the project to any bidder.

The VSC, in its best interests, reserves the option to accept or reject any or all proposals, to accept or reject any item or combination of items therein, to waive any irregularities or informalities in any proposal or items therein, and/or to negotiate with particular bidders following the evaluation of proposals without right of recourse by other bidders. A top proposal would be assessed in the judgment of VSC as best complying with all considerations set forth in this RFP. When VSC has tentatively selected a successful proposal, VSC may engage in discussions with the bidder to formulate plans in greater detail, to clarify unclear items for either party, and to otherwise complete negotiations prior to formal selection.

Evaluation Criteria (no weighting is implied by order of listing):

1. The extent to which the bidder's solution matches the requirements of the VSC.
2. Engagement methodology.
3. Bidder’s qualifications and references.
4. Cost and length of contract.

5.4 Bid Process

Date	Milestone
02/16/2024	RFP issue date
02/23/2024	Questions Due
03/01/2024	Bidder written proposal due date
03/08/2024	Finalists notified
Week of March 18, 2024	Finalist presentations to VSC
03/29/2024	Bidder(s) selected
**April 2024	Contract(s) made

** The VSC will make its best effort to meet these dates but will take the time necessary to make a well-informed decision and negotiate a good contract. Bidders participating in this RFP should expect this date to change. The VSC will be under no obligation to inform bidders of a change in this date. The VSC will inform bidders of a change in all other dates that are part of the bid process.

5.5 Confidentiality

The Vermont State Colleges comply with the Vermont Public Records Act, 1 VSA § 315 *et seq.* which requires public agencies to allow any person to inspect or copy any public record upon request. Accordingly, bidders are hereby advised that any communications, data, or other information received by the Vermont State Colleges during the RFP process could be subject to a public records request. However, certain public records are exempt from public inspection and copying, as set forth in 1 VSA § 317(c), including, for example, those portions of a record which meet the statutory definition of a trade secret. Accordingly, bidders should submit a second copy of their proposal, from which any portion of the proposal that the bidder reasonably believes to be exempt from disclosure under the Public Records Act has been redacted.

By submitting a proposal, you indicate that you understand the requirements of this subsection (5.5) and the potential applicability of Vermont’s Public Records Act to your proposal.

5.6 Indemnification

The bidder shall indemnify and hold VSC, its officers, agents, and employees free and harmless from any and all claims, liabilities, losses, actions, proceedings, suits, damages, and expenses, including out-of-pocket litigation costs and reasonable legal fees, arising from or relating to the bidder’s performance in response to this RFP and under any contract entered into with the successful bidder.

By submitting a proposal, and in exchange for VSC's consideration of same, you agree on behalf of yourself, your shareholders and your officers to be bound by the indemnification provisions of this subsection (5.6).

5.7 Rights of the VSC

VSC reserves the right, at its discretion, to pursue actions that include but are not limited to the following:

- Request additional information
- Request clarification of any sections or questions in the bidder's response to this RFP
- Reject, for any reason, any or all of the proposals submitted to VSC
- Issue subsequent RFP or RFP invitations to bid as a result of changes and/or refinements to the proposed project

This RFP does not obligate the VSC to accept any proposal, negotiate with any bidder, award a contract, or proceed with the project as it is outlined in this RFP.

5.8 Assignment

The bidder may not assign or transfer its rights or obligations under this RFP without the prior written consent of VSC, which consent shall not be unreasonably withheld. Any assignment of the RFP agreement by the bidder without the prior written consent of VSC shall void the RFP response from the bidder.

5.9 Insurance

You shall provide with your proposal, proof of insurance as stated below. In the event you do not carry the maximums requested, you must provide written proof that you will be able to provide the maximums if awarded the contract. You shall secure, pay for, and maintain in effect the following insurance during the contract period:

- Commercial General Liability Insurance: Including Bodily Injury and Property Damage Liability, Independent Contractor's Liability, Contractual Liability, Product Liability, and Completed Operations Liability in an amount not less than \$1,000,000 combined single limit, per occurrence, and \$3,000,000 annual aggregate.
- Workers Compensation and Employers Liability Insurance: For any bidders with employees, standard workers' compensation as required by Vermont State statute and employer's liability insurance in an amount not less than \$100,000 per accident, \$500,000 annual aggregate.
- Automobile Liability: For bidders who will drive on VSC's premises, Automobile Liability in an amount not less than \$1,000,000 per occurrence for bodily injury and property damage, including owned, hired, and non-owned vehicle coverage.
- Professional Liability: \$1,000,000 for each claim, when applicable.
- Cyber Liability: \$1,000,000 each event for Breach Response

If selected as the successful bidder, you agree to name the VSC as additional insured on your liability policies and shall provide a 30-day notice of cancellation or non-renewal of coverage to the VSC. The VSC does not need to be named as an additional insured on the workers' compensation policy.

If selected as the successful bidder, you agree to submit a copy of the Certificate of Insurance verifying the above coverage levels to the VSC twenty (20) days prior to selling or distributing products and services at VSC or otherwise performing under the contract. Any liability coverage on a “claims made” basis shall be designated as such on the certificate.

Failure of the bidder to take out and/or maintain any required insurance shall not relieve the bidder from any liability under the contract, nor shall the insurance requirements be construed to conflict with or otherwise limit the obligation of the bidder concerning indemnification. The bidder’s policies shall be considered primary insurance and exclusive of any insurance carried by VSC.

5.10 Intent to Bid

The undersigned (“You”) agrees to all provisions required in the Athletic CRM Tool RFP dated February 16, 2024 and all applicable addenda, with the exception of those listed below. Any exemptions listed may affect the viability of your proposal.

In addition, the undersigned (“You”) agrees to provide all equipment, material, and personnel associated with these services as described in the Athletic CRM Tool RFP dated February 16, 2024, and all applicable addenda.

Exceptions:

Section Reference Number	Reason for exception

Company Name

Signature of Authorized Representative

Print Name of Authorized Representative

Print Title of Authorized Representative