

PUBLIC NOTICE

Southwest Minnesota State University (SMSU) is planning to initiate a contract with Technosolutions in the next 1-2 months for use of the Slate CRM platform. To support this project, SMSU is issuing this public notice to seek quotes for CRM Implementation Services from qualified vendors. Please review the following information and, should you be so inclined, submit a quote for assisting in the launch of our new Slate CRM.

FORMAT OF PROPOSALS AND SUBMISSION

Responses must be submitted via email in Microsoft Word or Adobe PDF format. Attachment limits are **20MB**. If file sizes are too large, please create multiple smaller files and email them separately. Hyperlinks to submissions in cloud storage will not be accepted. All pages must be numbered and font size no smaller than 10-point. The email and the authorized representative of Minnesota State receipt time stamp will be used for consideration, not the senders.

Proposals received after the Proposal Deadline date and time will not be considered. Proposals made in pencil will be rejected. Alterations in cost figures used to determine the lowest priced proposal will be rejected unless initialed in ink by the person responsible for or authorized to make decisions as to price quoted. The use of “white out” is considered an alteration

Proposal Deadline

Submitted proposals must be received at the following email address no later **than 2pm CST on Thursday, June 30, 2022.**

Institution: Southwest Minnesota State University

Name: Christy Johnson

Title: Buyer 2 & Purchasing Clerk

Email: Christy.Johnson@smsu.edu

As part of the Minnesota State System, SMSU utilizes a home grown Student Information System known as Integrated Student Records System (ISRS). A multi-year effort is underway to move from ISRS to Work Day. The Finance and Human Resources modules are scheduled for deployment in Summer 2023 with the Student module deployment anticipated for 2026.

SMSU intends to use one database instance of the Slate CRM to support both recruitment and retention activities. This request does not obligate SMSU to award a contract or

complete the proposed project. SMSU also reserves the right to waive minor informalities and reserves the right to:

- 1) Reject any and all quotes received in response to this public notice;
- 2) Reduce the scope of project priorities;
- 3) Select a quote for contract negotiation other than the one with the lowest cost;
- 4) Negotiate any aspect of the quote with any Vendor;
- 5) Terminate negotiations and select the next most responsive Vendor for contract negotiations;
- 6) Terminate negotiations and prepare and release a new RFQ or a Request for Proposals (RFP);
- 7) Terminate negotiations and take such action as deemed appropriate.

This public notice seeks to discover the process and pricing of services to assist SMSU in launching the Slate instance. The Scope of Work items listed below should be considered somewhat fluid in that they may change slightly but all changes would be done in complete transparency with the vendor.

Quotes shall be valid for a term of 90 days.

We are most interested in assistance with:

High Priority

- Security settings
 - Users will be:
 - Office of Admission
 - Center for International Education
 - Online Learning and Transfer Partnerships
 - Graduate Studies
 - Deann Greibel Student Success Center
- Data flow (migration)
 - Minnesota State System SIS (ISRS) to Slate-Domestic
 - Minnesota State System SIS (ISRS) to Slate-International
 - Connect to Slate
 - Retain to Slate
- Early Alert
- Portal development

- Queries
- Communication Flow
- Texting set up
- Dashboards

Lower priority items:

- Internal reporting
- Data export
- Customizations
- Recommendation for additional features/tools in the future down the road
- Page layout
- Scoring and survey functionality
- MicroSoft Dynamics 365 to Slate

Based CRM decision and vendor approach to the project, we estimate a contract start date to be August 15, 2022.

Please address the following:

- Please provide Company background and demographics
- Are your services delivered On site/remote/hybrid ?
- Please provide names/references of where you have launched a Slate instance
- Timelines or mileposts to the project
 - Should we expect a team approach or a single “manager”?
 - Address any ongoing support available
 - Will there be a discovery meeting to set the project plan and schedule?
 - Pricing
 - What is the estimate of pricing and hours to accomplish the task(s) outlined? Please identify cost per priority as best possible.
 - Please separate Higher Priority from Lower Priority

All proposals will be evaluated by our core team as to the:

- Cost 30%
- Project Plan 20%
 - What specific tasks are presented?
 - What tasks are missing?
- Projected timeline 15%

- Dependency on SMSU staffing or theirs?
 - Timeline for Recruitment/retention or are they different?
- Slate history and referrals of existing customers 10%
- Capability to provide training and support that ensures project success 10%
 - Detailed training model
- Capability of proposal to meet business and technical requirements 5%
- Capability to implement the proposed solution 5%

Thank you for your attention. Attached is a sample Minnesota State System Professional Technical Services Contract.