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## **Request for Proposal**

# **Enterprise Student Information, Financial Aid and CRM Software and Related Services**

**(RFP #2019-04)**



**San Bernardino Community College District  
114 South Del Rosa Drive  
San Bernardino, CA 92408**

**RFP Released: April 29, 2019**

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**Request for Proposal**  
**Enterprise Student Information, Financial Aid and CRM Software and Related Services**  
**Request for Proposal (RFP) #2019-04**

**Table of Contents**

Introduction .....	3
Profile of the San Bernardino Community District .....	3
The Intent of the District .....	4
Procurement Process .....	4
RFP Instructions and Requirements .....	5
Proposal Information .....	6
Existing Applications and Information Technology at the District .....	9
Important Facts .....	12
Dates and Timeframes* .....	13
Important Criteria for Proposed Software .....	13
Supplementary Questions .....	16
General Technical Information .....	17
Appendix A: Required Format for RFP Responses .....	18
Affidavit of Non-Collusion .....	21
Vendor Profile and Designation of Names .....	22
Local Vendor Designation Form .....	23

**Enterprise Student Information, Financial Aid and CRM Software and Related Services  
Request for Proposal (RFP) #2019-04**

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**Introduction**

The purpose of this document is to invite vendors to participate in the San Bernardino Community College District (henceforth known as "SBCCD") procurement process for acquiring Enterprise Student Information, Financial Aid and Customer Relationship Management Software and Related Services. Specifically, the goal is to solicit proposals for products and services that address SBCCD's needs

**Profile of the San Bernardino Community District**

The District is one of 72 community college districts within the California Community College system, the largest educational system in the world, which encompasses 112 community colleges.

The District has an 86-year history of providing its community and students with quality and affordable vocational certificates, associate's degrees, and preparation for transfer to a four-year college or university through San Bernardino Valley College (SBVC) and Crafton Hills College (CHC). In addition, the Economic Development and Corporate Training Division (EDCT) and KVCR TV-FM provide professional development and cultural and educational information to the community at large.

As part of the District Strategic Plan approved by the Board of Trustees on April 9, 2015, Goal 4 of the Strategic Plan was to address District Operational Systems. Specifically the goal stated key objective was:

"Improve the district systems to increase administrative and operational efficiency and effectiveness with an emphasis on student records, human resources, facilities, technology, financial systems, and other workflow operational systems."

This procurement is targeted at helping the District achieve this Goal within the District's Strategic Plan.

## **Enterprise Student Information, Financial Aid and CRM Software and Related Services Request for Proposal (RFP) #2019-04**

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### **The Intent of the District**

SBCCD is seeking vendor proposals for the procurement, implementation, and ongoing success of Enterprise Student Information and Financial Aid, and Customer Relationship Management Software and Related Services. In addition, SBCCD seeks a system that includes ancillary products (e.g., database management systems) and professional services.

SBCCD is eager to enhance its efforts in the following areas:

- Streamlined business processes
- Improved services for students, faculty, and staff
- Reduce the number of disparate systems needing to be interfaced
- Greater access to critical resources
- Improved productivity through the use of web-enabled and mobile-first applications
- Responsiveness to state/federal/internal reporting requirements
- Efficient access to data, information, reports and transaction processing
- Improve analytical and statistical analysis of data over time
- Move to cloud-based solutions

At a minimum, it is the SBCCD's intent to purchase/lease an Enterprise Student Information and Financial Aid and Customer Relationship Management Software and Related Services. In the event that a single vendor solution cannot meet the requirements of all areas, SBCCD reserves the right to procure solutions from multiple vendors. Vendors must demonstrate that the systems are able to integrate with all areas of SBCCD's Financial, Purchasing, Human Resources and Payroll operations. As needed, SBCCD will acquire related software products (e.g., compilers, report writers).

SBCCD will procure as-needed services for training, functional consulting, project management, data conversion, software customization, software integration and maintenance, etc.

Vendors may provide proposals for software and services, software only or services only. Vendors proposing implementation services only should be authorized partners for the associated software product.

This RFP includes a presentation of general system requirements and technical requirements. Vendors are encouraged to be as responsive as possible to each item within this document.

### **Procurement Process**

This RFP and any resulting contract or awards shall be governed by the Section 81645 of the State of California Education Code. As such, the following shall apply:

"The governing board of any community college district may contract with a party who has submitted one of the three lowest responsible competitive proposals or competitive bids for the acquisition, procurement, or maintenance of electronic data processing systems and equipment, electronic telecommunications equipment, supporting software, and related materials, goods, and services, in accordance with procedures and criteria established by the governing board."

SBCCD's procurement process will entail four major steps:

Step One:

Vendors will be invited to submit proposals in response to this RFP. Proposals must at a minimum meet SBCCD's mandatory requirements, as listed in the "Important Criteria for Proposed Software" section of this RFP and should focus on products and services that best satisfy SBCCD's needs, as presented in this RFP. No cost information is desired from vendors in Step One of the procurement process.

**Enterprise Student Information, Financial Aid and CRM Software and Related Services  
Request for Proposal (RFP) #2019-04**

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**Step Two:**

SBCCD's selection committee will evaluate vendors' written responses with respect to SBCCD's needs and important criteria, as presented in this RFP. Qualified vendors will be invited to continue in the procurement process.

**Step Three:**

Qualified vendors will be asked to perform in-depth product demonstrations. Such demonstrations will be based upon SBCCD's specific functional needs and requirements. Vendors responding to just the implementation services aspect of the RFP will be invited to deliver a presentation after the software evaluation is completed and a software provider is identified as the preferred vendor.

**Step Four:**

After a thorough evaluation of vendors' proposals and on-site demonstrations, SBCCD will solicit proposed pricing from qualified vendors. Furthermore, SBCCD may ask qualified vendors to refine their proposals for various products and services. At the conclusion of this process, SBCCD will make a final recommendation to SBCCD's Governing Board to authorize a contract.

**RFP Instructions and Requirements**

Below are instructions and requirements for all vendors. The District will not consider a vendor's proposal unless it is consistent with all material instructions and requirements.

- The District has engaged the services of Strata Information Group (SIG) to assist in this procurement process. All vendors shall consider Harold George of SIG as sole point of contact for all communication throughout the entire selection process. Harold can be reached at:

Harold George  
General Manger, Professional Services  
Strata Information Group  
3935 Harney St, Suite 203  
San Diego, CA 92110 210-364-1349  
Cell – 210-364-1349  
Email – george@sigcorp.com

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## **Proposal Information**

Submittal Deadline: **2:00 PM, Friday, May 24, 2019**

Place of Bid Receipt: San Bernardino Community College District  
Business Services  
114 South Del Rosa Drive  
San Bernardino, CA 92408

Mailing Address: San Bernardino Community College District  
Attn: Steven J. Sutorus,  
Business Manager  
114 South Del Rosa Drive  
San Bernardino, CA 92408

Proposals will be received up to the above-indicated time and date. Late proposals will not be accepted and will be returned unopened. Proposals may be delivered in person, by U.S. mail, or courier services. Fax proposals are not acceptable. Proposals must be submitted in an envelope clearly marked with the following information: Enterprise Student Information Systems Software and Related Services (RFP #2019-04).

Proposals shall be binding upon the provider for 180 calendar days following the award recommendation date. All terms and specifications included in or appended to this solicitation apply to any subsequent award.

Number of Copies: Submit four (4) copies of the proposal. An electronic copy in MS-Word and PDF formats on a flash drive must also be provided. Brochures and other promotional materials are not necessary unless you consider them to be the only way to convey your services.

- Each proposal shall conform to the format presented in Appendix A. Proposals shall include tabs at each identified section, and all information shall be presented in the order that is identified in Appendix A.
- Each proposal shall include a Non-Collusion Affidavit signed by the vendor with his/her usual longhand signature. Proposals by partnerships must include the names of all partners and be signed in the partnership name by a general partner with the authority to bind the partnership in all relevant matters. Proposals by corporations must include the legal name of the corporation followed by the signature of a person who is authorized to bind the corporation. The name of each signatory shall be typed or printed below the signature. When requested by the District, satisfactory evidence of the authority of all those who signed the proposal shall be furnished.
- Proposals may be withdrawn by a vendor prior to May 24, 2019, by submitting a written request to the District. Thereafter, a vendor shall not be relieved of the proposal submitted without the District's consent or vendor's recourse to Public Contract Code 5100 et seq.
- All addenda issued prior to May 24, 2019, shall form a part of the specifications issued to vendors for the preparation of their proposals.
- The District reserves the right to reject any or all proposals, or any portion or combination thereof. In addition, the District reserves the right to waive any irregularity or informality within the proposal or procurement process.
- Section 508 Compliance statement: Vendors bidding on this proposal must be willing to accept the following statement as part of any agreements that may be entered into with the District's: *"Vendor hereby warrants that the products or services to be provided under this agreement comply with the accessibility requirements of Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794d), and its implementing regulations set forth at Title 36, Code of Federal Regulations, part 1194. Vendor agrees to promptly respond to and resolve any complaint regarding accessibility of its products or services, which is brought to its attention. Vendor further agrees to indemnify and hold harmless the San Bernardino Community College District, the Chancellor's Office of the California Community Districts, and any California community college using the vendor's products or services from any claim rising out of its failure to comply with the aforesaid requirements. Failure to comply with these requirements shall constitute a breach and be grounds for termination of this agreement."*

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- The award of a contract to a qualified vendor, if made by the District, will be based upon a comprehensive review and analysis of each proposal. The District shall be the sole judge of the merits of proposed products and services. The District, alone, shall determine its best interests and act accordingly. All vendors shall abide by the decisions of the District.
  - Upon the District's request, a vendor shall submit satisfactory documentation of its financial resources, experience in providing relevant products/services, personnel who are available to perform with respect to the proposed contract and any other desired evidence of the vendor's qualifications.
  - Vendors are entirely responsible for any expenses that are associated with their participation in the procurement process. The District shall have no responsibility.
  - The District reserves the right to perform whatever research it deems appropriate in order to assess the merits of any vendor's proposal. Such research may include, but not necessarily be limited to, discussions with outside consultants, interviews with the vendor's existing clients, and analysis of industry reports.
  - The District reserves the right to seek clarifications and follow up information from vendors.
  - Vendors are hereby advised that the District is bound by open records laws and policies when it receives vendor-submitted materials. Any information that constitutes a trade secret and that a vendor wishes to declare confidential should be expressly noted as such at the top of each relevant page and be in compliance with all public agency contract code requirements for permitting exclusion.
  - In the event of litigation, the related matters shall be governed by and construed in accordance with the law of the State of California. The venue shall be with the appropriate state or federal court located in San Bernardino County, California.
  - The vendor selected by the District will be required to execute a formal contractual agreement based upon the terms and conditions included in this RFP. A draft contract may be provided as consideration in the development of the Agreement. All contract documents are subject to the approval of the District and its legal counsel. Electronic approval of terms and conditions upon sign-in will not be binding. All contract amendments must be fully executed between those identified as signatory by each party.
  - Each vendor and subcontractor, if any, must possess all appropriate and required licenses or other permits to perform the work as identified in the contract documents. Upon request, each vendor shall furnish the District with evidence demonstrating possession of required licenses and/or permits.
  - The vendor shall not discriminate against any prospective or active employee engaged to perform any work because of race, color, ancestry, national origin, religious creed, sex, age, disability, or marital status. The vendor agrees to comply with applicable federal and state laws including, but not limited to, the California Fair Employment and Housing Act, beginning with Government Code Section 12900 and Labor Code Section 1735. In addition, the vendor agrees to require compliance with this provision by any subcontractor.
  - No interest in the contract shall be transferred to any other party without the permission of the District's Governing Board.
  - The vendor agrees to indemnify and hold harmless the District from any claim that arises out of its failure to comply with the Rehabilitation Act of 1973, as amended.
  - In accordance with the provisions of Section 3700 of the Labor Code, the successful vendor shall secure the payment of compensation to its employees. The vendor hereby acknowledges, and by submitting a proposal, agrees to the following statement:

"I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for worker's compensation or to undertake selfinsurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract document."

- Insurance: Vendor shall not commence work until it has obtained the insurance required herein and has submitted proof of such coverage to the District. Vendor shall not allow any subcontractor, agent, or employee to commence work on the contract without proof of same. Coverage must be secured and maintained for the duration of the contract.

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- (a) Workers' Compensation Insurance not less than the statutory limits and including employer's liability coverage limits not less than \$1,000,000.
  - (b) Comprehensive Commercial General Liability Insurance with limits not less than \$2,000,000 per occurrence.
  - (c) Comprehensive Automobile Liability Insurance with limits not less than \$1,000,000 per occurrence for all owned, non-owned and hired vehicles.

The insurance certificates for (b) and (c) must list the District as additional insured, as follows: ***San Bernardino Community College District, its Board of Trustees, officers, agents, representatives, employees, and volunteers are added as additional insured.*** The certificate must include a copy of the additional insured endorsement that amends the insurance policy.

- The District does not discriminate with regard to race, color, gender, national origin, or disability in the awarding of contracts.
- Please fill out and include the local vendor preference form and include the necessary documents if your organization qualifies.
- The District encourages the submission of proposals from all vendors who can meet the mandatory requirements set forth in this RFP.



**Existing Applications and Information Technology at the District**

**General Background**

The District supports a portfolio of administrative applications that provide services district-wide to students, faculty, and staff. This portfolio includes the Ellucian Colleague® Student Information System used by Admissions, Registration, Academic Records, Student Accounts, and Financial Aid;

ADP, for applicant tracking; Human Resources systems, leave tracking system and payroll. Systems utilized by the District also include Oracle Financial Cloud. Additional systems include the HP Legacy system and Questica budgeting system that is supported by the County.

The district supports Active Directory for account management and network access and authentication.

**Current Application Software Supported**

<b>Systems Name</b>	<b>Source</b>	<b>Areas Directly Supported</b>	<b>Functional Description</b>
Colleague®	Ellucian	Academic Records, student accounts, financial aid	Student Information System hosted by Ellucian on AWS. Does functions such as student registration, student education planning and supports the Mobile application
EPICS and ADP	County/ADP	Human Resources	Cloud-based solution for Recruiting and Hiring
Questica	Questica	Finance and Business Services	Budget Management
Oracle Financials	Oracle	District Fiscal services	Accounting and fiscal ERP
ImageNow	Hyland	District-wide	Scanning and Imaging storage/archiving software that maintains images of important documents according to board policies
SARS Anywhere, TRAK, Messages	SARS	Financial Aid, Counseling, Tutoring at both colleges	Serves scheduling, tracking, notification and early alert functions for faculty/counselors/staff to track and communicate with students
Contract Database	Access DB	Purchasing	Contract Management
PeachTree	Sage	District Fiscal services	Accounting Software
Safe Colleges	Keenan	HR/Safety	Training
Pure Safety	Citadel	HR/Safety	Training

Systems Name	Source	Areas Directly Supported	Functional Description
EZ Spooler	ROC Software	Any area that prints from Colleague	Print management software
OCLC/ExLibris	OCLC/Alma	Library	Online library resources for students of CHC and SBVC
Informer	Entrinsik	District-wide	reporting tool for Ellucian Colleague
Tableau	Tableau	District-wide	Dashboarding and reporting tool for various data sources
Curricunet	Governet	Curriculum and CHC and SBVC	Curriculum software for CHC and SBVC faculty
Kourier	Kore Technologies	TESS	integration software for Ellucian Colleague
Early Alert	Starfish	CHC and SBVC	Early alert software for faculty, students and staff at CHC and SBVC
Degree Planner	Hobsons	CHC and SBVC	Degree plan and audit software for CHC and SBVC
OpenCCCApply	CCCCO	A&R at both colleges	download student applications into SIS
Credentials	Credentials	A&R at both colleges	Allows students to get official transcripts from online ordering
XAP	XAP	CHC and SBVC students	Electronic transcripts for students at both colleges
Bankmobile	Bankmobile	Financial Aid and fiscal services	Students can get their financial aid on card or check
Canvas	Instructure	CHC and SBVC students and faculty	LMS for CHC and SBVC students/faculty
Presence student engagement	Presence	SBVC students and staff	Student engagement software for SBVC
Maxient	Maxient	CHC and SBVC students and staff	Student conduct software for CHC and SBVC
Regroup	Regroup	CHC and SBVC students/faculty/staff	Mass notification system district-wide
FlexTrack	Homegrown	CHC and SBVC faculty	tracks flex time for faculty
LeaveTrak	Homegrown	District-wide	Track sick/vacation time for employees district-wide
Discover ACI	Follett	Bookstores at CHC and SBVC	Bookstore integration with Colleague for both colleges

Systems Name	Source	Areas Directly Supported	Functional Description
EOPS/CARE/Cal-Works	Follett	Bookstores at CHC and SBVC	Bookstore integration with Colleague for both colleges
Executive Information System	Homegrown	District-wide	data warehouse for various uses district-wide
Photo ID	Photo ID	CHC and SBVC	Photos taken of students that are imported into Colleague
25 Live	CollegeNet	CHC and SBVC Instruction and Admin Services	Room scheduling software
Accuplacer	Accuplacer	CHC and SBVC assessment	Assessment scores imported into Colleague for course placements
Pyramed	Pyramed	CHC and SBVC Health services	Export from Colleague into Pyramed
Oracle Datawarehouse	Oracle	CHC and SBVC research	New data warehouse built using Oracle BI Cloud
Ellucian Mobile	Ellucian	CHC and SBVC students	mobile app for SBVC and CHC students
Cynosure	Cynosure	CHC and SBVC students	Orientation software for SBVC and CHC students
Web Survey	Homegrown	CHC and SBVC students	Surveys setup by IR to capture data from students who log into our SIS
eSchedule	Homegrown	CHC and SBVC students	Online schedule that gets data from SIS
Scholarship Export	Homegrown	CHC and SBVC students	
CourseLeaf	LeapFrog	SBVC faculty and staff	Curriculum, Catalog and Schedule software for SBVC
CampusLogic	CampusLogic	SBVC Financial Aid	Financial Aid ISIRS and other documents
PayPal	Paypal	SBVC and CHC	Payment Gateway for web-based payments
Omnitrans	Informer	SBVC and CHC students	Students have ability to use Omnitrans for bus transportation
Quottly	CVC-OEI		Course and section information for potential students in the OEI

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**Important Facts**

Web Sites	<a href="http://www.sbccd.edu">http://www.sbccd.edu</a>
Number of Full-Time Faculty	266
Number of Part-Time Faculty	743
Number of Academic Administrators and Classified Administrators/Managers	100
Number of Regular Classified FT and PT Employees	397
Number of Short-term Temporary Classified Employees	618
Major Sites	San Bernardino Community College District San Bernardino Valley College Crafton Hills College
Accreditation	Western Association of Schools and Colleges (WASC)
Fall 2018 Enrollment (Headcount)(FTES)	23,318 Headcount 15,304 FTES 2017-2018
FY 2017– 2018 Unrestricted General Fund Budget	\$ 94,624,098 million

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## **Dates and Timeframes\***

**\*All Dates are subject to change at the discretion of the District**

<b>Event</b>	<b>Date/Timeframe</b>
Release of RFP	April 29, 2019
Deadline for vendors' questions to the District	May 6, 2019
Deadline for the District to respond to vendor questions	May 13, 2019
Deadline for vendors' submission of proposals	May 24, 2019 @ 2:00PM (PST)
Selection of vendors who will be invited to give on-site demonstrations	June 5, 2019
Onsite vendor functional demonstrations and presentations	Oct 7-11, 2019 Oct 21-25, 2019 Nov 4-8, 2019
Onsite 1-day vendor technical demonstrations (if not able to complete during functional demonstration week)	Nov 11, 2019 Nov 12, 2019 Nov 13, 2019
Request for Software Pricing Proposals issued	Week of Nov 4, 2019
Software Pricing Proposals Due	Week of Nov 22, 2019
Implementation Partner Selection	Dec 3-7, 2019
Implementation Services Pricing requested	Dec 3-7, 2019
Pricing due from Implementation Services Partners	Dec 13, 2019
Finalization of contract terms and pricing	Dec/January 2019
Approval of contract award by the District's Board	January 2020

All questions should be submitted to Harold George of SIG, [george@sigcorp.com](mailto:george@sigcorp.com) – Email, in writing by the deadline indicated above. Written answers to questions will be distributed to all vendors on or before May 6, 2019. Vendors are strongly encouraged to schedule their resources according to the above dates and timeframes.

## **Critical Criteria for Proposed Software**

### **For Software Vendors:**

Describe how your solution will provide for the following "Critical Criteria" desired in the selected solution.

1. Available in the cloud as either a "Software as a Services" (SaaS) offering or Hosted Application Services (ASP) model.
2. Includes modules for Customer Relationship Management, Admissions, Student including catalog and schedule development, Registration, Academic Records, Degree Audit, Student Educational Planning, Student Success Tracking, Student Services, Student Accounts Receivable and Financial Aid. Vendors must demonstrate that their systems are able to integrate all areas of SBCCD and encompass all of the existing systems. Vendors must demonstrate that their systems reduce/eliminate redundant entry of data. In addition to the above, SBCCD is looking to include tightly integrated applications for Document management.

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3. Must be web and mobile-enabled and include self-service applications for students, faculty and staff.
  4. Demonstrate the ability of their systems to provide for multiple levels of data security, including record level security and demonstrate how the system insures the integrity of the data being entered. This security must include robust logging of changes to data items and the ability to recreate the timeline of changes.
  5. Describe how your systems provide for the automation of business processes through the use of a workflow engine, workflow modeling and workflow definition tool that will allow SBCCD to automate many multi-step processes.
  6. Describe the various levels of reporting capabilities and demonstrate how to easily access data for daily transaction reporting as well as complex multi-level reporting in support of executive decision making and institutional research type of objectives.
  7. Describe your solutions support of technologies that will allow for tighter, seamless, real-time integration of data between the enterprise solution and necessary third-party applications in support of functionality not present in the enterprise solution.
  8. Describe how your solution supports a term-based and non-term based educational environment where academic programs and courses can start and stop on numerous schedules not related to the typical term/semester calendar.
  9. SBCCD is currently utilizing the Oracle ERP Cloud for financial systems and ADP for Human Resources and Payroll systems. Please describe how the vendor solution will provide for integration with this key administrative system.
  10. Describe your commitment to the standards and requirements of California Community Colleges reporting for 320 SSSP/SEA and MIS requirements. Please describe how, as a vendor, you will provide support for these state-mandated requirements now and into the future. See the "Supplementary Question A. General Systems #2" in the following section for the level of detailed information requested.
  11. Provide information regarding future development of your proposed and future products for the next 3 to 5 years and beyond.
  12. Describe how clients contact your support staff and how client inquiries are managed until resolution. What online support capabilities does your organization offer in support? Detailed Service Level Agreement (SLA) is preferred.

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**For Implementation Service Providers:**

For vendors responding only as implementation service providers please complete the following sections of the proposal response template in Appendix A. Sections 1, 2, 3, 5, 8, 9, 12, 13, 14, 15, 16.

Please provide your answers the following questions as your answer to section 5 of the proposal response template.

1. Please indicate which vendor software solution you would be qualified to provide services.
2. Please describe your firm's breadth and depth of experience in implementing the software solution.
  - a) Please indicate the number of completed implementations your firm has managed?
  - b) Please indicate the number of projects you are currently managing?
  - c) Please indicate the number and level of experience by module of your consultant pool?
3. Please provide a list of the Higher Education Clients where you have completed implementation or are in the process of a similar implementation project? Please include contact person and contact information for each client listed. Please prioritize by California Community College, California State Universities, University of California Institutions, Other Community College and Other State and Private Colleges and Universities.
4. Please provide an outline of your firm's implementation methodology for the software solution you would be supporting.
5. If vendors use discovery questionnaires for determining costs, please include a copy of those questionnaires with your response.

Please provide a high-level implementation timeline for the modules indicate in this RFP with the projected project start date of March 2020 and go live for Fall 2021 term.

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## **Supplementary Questions**

The following questions are important with respect to the evaluation of proposals. Vendors should provide clear and detailed responses to each item.

### **A. General Systems:**

1. Please provide detailed information about reference sites. We are specifically interested in your most recent implementations. Please include the following:
  - a. Names of institutions
  - b. Contact names, titles, telephone numbers, and email addresses
  - c. List of installed software products and the production status of each, when they were implemented, and which release.

Please organize the information about reference sites with respect to the following categories:

- California Community College Districts
  - California state and private universities
  - Community College not in California
  - State and private universities and colleges
2. For each of the following items, please provide specific information about how the proposed software supports SBCCD's required reporting functions.
    - California MIS (including staff file data)
    - SSSP/SEA
    - California 320
    - Other state and federal reports
  3. Is the proposed software web-enabled? If so, please describe. What browsers and versions do you support?
  4. Please describe how your solution meets Section 508 accessibility requirements.
  5. Please describe how your solution meets California law related to Social Security numbers (SB 25).
  6. Please describe all available report writers, query tools, and other ancillary software.
  7. Please describe any online training materials that SBCCD should consider.
  8. Please describe the support and training provided on a regular basis after implementation.
  9. Please describe data migration and integration APIs or Web Services available within your solution.
  10. SBCCD anticipates that a number of ancillary systems will need to be integrated with the new Enterprise Student Information, Financial Aid and Customer Relationship Management Software and Related Services. The applications listed in the section "Current Application Software Supported" are likely to remain and require integration with the selected vendor's solution. Please answer the following questions for each of these applications listed.
    - Does the vendor have a formal business relationship or partnership with the ancillary software vendor?
    - Does the vendor provide a standard interface for this ancillary software product?
    - Is the software integration for this ancillary product provided by the ancillary product vendor?
    - If the vendor does not provide a standard interface, has the vendor worked with other customers to build a custom interface for this software integration? If yes, please provide two or three client references.



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- Does the vendor know of customers who have done their own integration with this product and would they be willing to share their solution? Please provide the names of two or three clients who would be willing to share the solution.
  - Does the vendor provide for an integrated solution, which you are proposing that would replace the functionality of the ancillary software product?

**B. General Technical:**

1. Please indicate if the system is offered as any of the following:
  - a. Cloud-Based Software as a Service (SaaS)
  - b. Hosted Application Services (ASP)
2. Describe the SaaS or ASP environment and services available to support the systems being proposed.
3. Describe the process for supporting the installation of software updates.
4. Describe the technology used to support data integration between the hosted (cloud) applications and other applications that remain on-premises.
5. Does your application run on a variety of client workstations, e.g., PCs, Macs?
6. Does your solution support a **completely** browser-based work environment? If not, is such an environment planned? If planned, when is it scheduled to be released?
7. Please describe a typical technical and support staff structure to maintain and support your solution for a campus of our size (e.g., database administrators, system administration, business analysts, programmers, help desk, etc.)

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## Appendix A: Required Format for RFP Responses

### Section 1: Executive Summary

Provide an executive summary that summarizes the proposal.

### Section 2: Vendor Profile

Provide the following information:

- (a) Name of vendor
- (b) Vendor's mailing address, telephone number, FAX number, and web site address
- (c) Vendor's primary contact person
- (d) Primary contact person's title, mailing address, telephone number(s), FAX number, and email address
- (e) Brief overview of the vendor's company, products, and services

### Section 3: Vendor's Understanding of the RFP

- (a) Provide a statement that acknowledges the vendor's understanding of the Procurement Process as presented in the RFP.
- (b) Provide a statement that acknowledges the vendor's understanding of the RFP instructions and requirements as presented in the RFP.

### Section 4: Critical Criteria for Proposed Software

Provide responses to each of the items within the "Critical Criteria for Proposed Software" section of the RFP.

### Section 5: Critical Criteria for Implementation Service Providers

Provide responses to each of the items within the "Critical Criteria for Proposed Software" section of the RFP.

### Section 6: Proposed Software Products

- (c) Identify all applicable software that is proposed or required.
- (d) Identify all database technologies and/or file management systems that are proposed or required.
- (e) Identify all required ancillary software (e.g., middleware, compilers, and report writers) that SBCCD should consider.
- (f) Identify all optional ancillary software (e.g., middleware, compilers, and report writers) that SBCCD should consider.
- (g) Summarize the features, functionality, and characteristics associated with each software product.

### Section 7: Supplementary and General Technical Questions

Provide a response to each of the items within the "Supplementary Questions" section of the RFP.

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## Section 8: Proposed Training and Implementation Services

- (h) Describe the training and implementation support that is required, recommended, available, or provided for each proposed software product, including the database management system.
- (i) Provide a suggested implementation schedule, including major milestones.
- (j) For each major system implementation activity, estimate the number of hours of vendor-provided professional services that are needed.

## Section 9: Additional Services

- (k) Describe all additional services (e.g., remote technical support) that are required, recommended, and available or provided for each proposed product.
- (l) Provide information about the internal staffing requirements that SBCCD will encounter with the proposed system.
- (m) Provide information about national, regional, and state specific Users Groups supported by your company. Include contact information for Officers of those Users Groups.

## Section 10: Data Conversion and System Interfaces

- (n) Describe the products, utilities, processes, and services recommended or needed for the conversion of SBCCD's existing data.
- (o) Identify a means of developing and maintaining interfaces between SBCCD's existing enterprise systems and SBCCD's future enterprise systems during the implementation process.
- (p) Identify a means of developing and maintaining interfaces between the proposed applications and SBCCD's existing ancillary systems (e.g., document imaging, and library), some of which are web-enabled.

## Section 11: Software Maintenance and Enhancements

- (q) Describe the benefits, impacts, and schedules of new releases and modules. State the circumstances under which such releases are mandatory or optional.
- (r) Describe the procedures, both during and after the warranty period, for obtaining product support.
- (s) Describe, in detail, how gaps between the vendor's baseline product and SBCCD's functional needs will be identified, analyzed, and resolved. Given SBCCD's requirement to preserve existing functionality (but not necessarily present business processes), it is important for vendors to present a strategy that enables SBCCD to maintain the capabilities that are inherent within its existing enterprise solutions.
- (t) Explain how configurations can be made by the vendor and/or SBCCD to tailor the operation of the software.

## Section 12: Vendor's Corporate Strength

Describe the vendor's corporate history, market segment(s), client base, employee base, research and development programs, and financial well-being.

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### Section 13: Optional Products and Services

Describe, in detail, all optional products and services. Vendors are hereby advised that SBCCD may want to procure an optional item but might not be able to do so if it is not formally declared in this section. Optional products might include query tools, workflow systems, analytics, utilities, documentation, training materials, data warehouses, database technologies, security mechanisms, etc.

### Section 14: Additional Information

Provide any additional information that SBCCD should consider in its evaluation of proposals. This would include a list of whether your company is currently involved in litigation with any of your clients. Do not provide marketing brochures or generic information that does not meet your specific solution to this Request for Proposal.

### Section 15: Acknowledgement of Addenda

Provide attached proposal form that acknowledges understanding and compliance with RFP conditions and acknowledges the issuance and receipt of any RFP addenda, if applicable.

### Section 16: Contact Information Page

Provide the following contact information

- (u) Company Name
- (v) Mailing Address
- (w) Telephone Number
- (x) Fax Number
- (y) Authorizing Signatory Information
  - 1. Individual:  
Name & Title
  - 2. Partnership  
Name, Title
  - 3. Corporation  
Name, Title, Position, Corporate Seal

**Request for Proposal  
San Bernardino Community College District  
RFP No. 2019-04**

**Enterprise Student Information, Financial Aid and CRM Software and Related Services**

**Affidavit of Non-Collusion**

**STATE OF CALIFORNIA**

The undersigned declares:

I am the \_\_\_\_\_ of \_\_\_\_\_, the party  
(Title) (CONTRACTOR Name) making the foregoing bid.

The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

I declare under the penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_ at \_\_\_\_\_.  
(SBCCD, State)

Signed: \_\_\_\_\_

**Request for Proposal  
San Bernardino Community College District  
RFP Number 2019-04  
Enterprise Student Information, Financial Aid and CRM Software and Related Services**

**Contractor Profile Form & Designation of Names**

CONTRACTOR Name: \_\_\_\_\_

DUE NO LATER THAN 2:00 pm Friday May 24, 2019

In response to SBCCD's Notice Inviting Proposals for Enterprise Student Information, Financial Aid, CRM Software, and related services, the undersigned submits this firm offer to:

SBCCD RFP 2019-04  
Attn: Steven J. Sutorus, Business Manager,  
114 S. Del Rosa Dr. San Bernardino, CA 92408

**Section 1: Designation of Names**

Person Responsible for Bid: \_\_\_\_\_

Street Address: \_\_\_\_\_

SBCCD, State & Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Business Type: \_\_\_\_\_ TIN: \_\_\_\_\_

(Corporation, Sole Proprietorship, etc.) (EIN or SSN)

**Section 2: Bid**

CONTRACTOR must enter a fixed price for each Unit Price item in the space(s) provided on the next page of the Bid Form. Bidder's unit prices shall include all labor, materials, tools, equipment, overhead, profit, and all other direct and indirect costs and expenses to produce and deliver as required. Prices must be net including discounts.

I, \_\_\_\_\_, the undersigned, the \_\_\_\_\_ of  
*(Type/Print Name)* *(Title)*

\_\_\_\_\_, hereby declare that I am duly authorized to execute this  
Bid *(Name of Company)*

Form; that I have carefully examined the requirements of this Bid; acknowledge receipt and incorporation of the following Addenda, ; that this Bid Form constitutes a firm offer to SBCCD that if awarded, all prices shall remain effective as required on this Bid Form; and that, under penalty of perjury under the laws of the State of California, to the best of my knowledge and belief, the information contained in this Bid Form is true and correct.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Request for Proposal  
San Bernardino Community College District  
RFP Number 2019-04**

**LOCAL VENDOR DESIGNATION FORM**

**SBCDD AP 6330 Section 3:** The Purchasing Department will accept recommendations from the requesting department for potential vendors, but will endeavor, where possible, to encourage the use of local and small business enterprises in its procurement activities. On all procurement activities that must be competitively bid, or for which the District must receive quotes, such will be evaluated with a ten (10%) percent preference for local vendors. The vendor must claim local vendor preference to be considered. Please note the following exceptions:

- Those contracts which State Law or, other law or regulation precludes this local preference.
- Purchases made through cooperative purchasing and leveraged procurement agreements and piggyback purchases.
- Public Works construction projects.

A "local" vendor will be approved as such when, 1) it conducts business in a physical location within the County of San Bernardino; and 2) it holds a valid business license issued by an agency within the County of San Bernardino; and 3) business has been conducted in such a manner for not less than six months prior to being able to receive the preference. Proof of eligibility will be provided to the District as part of the vendor application process.

Subject to the Local Vendor Preference, final vendor designation will be made by the Purchasing Department.

Is your company requesting to be designated as a local vendor? Yes\_\_\_\_ No\_\_\_\_

If yes, does your company conduct business in a physical location within the County of San Bernardino? Yes\_\_\_\_ No\_\_\_\_

If yes, does your company hold a valid business license issued by an agency within the County of San Bernardino? Yes\_\_\_\_ No\_\_\_\_

If yes, please include a copy of your current business license as an attachment to this application.

If yes, has your company been conducting business in San Bernardino County for at least six months? Yes \_\_\_\_ No\_\_\_\_