CRM REQUEST FOR PROPOSALS

December 2014
# Table of Contents

ABSTRACT.......................................................................................................................... 3

ABOUT THE UNIVERSITY ECONOMIC DEVELOPMENT ASSOCIATION.............................. 4
  MISSION .................................................................................................................................. 4
  VISION .................................................................................................................................. 4

UEDA’S INFRASTRUCTURE .................................................................................................... 5
  UEDA’S Team ...................................................................................................................... 5
  Committee Usage ............................................................................................................... 5

TYPES OF USERS .............................................................................................................. 6

UEDA’S MEMBERSHIP ......................................................................................................... 7
  Membership ......................................................................................................................... 7
  Membership Benefits for All Levels of UEDA Membership: ............................................. 7
  Higher Education and Research Organization Members ....................................................... 7
  Economic Development Organization Members ................................................................. 8
  Private Sector Members ...................................................................................................... 8
  UEDA Summit Attendees .................................................................................................... 8

WHAT UEDA CURRENTLY USES ...................................................................................... 9
  HigHrise ............................................................................................................................ 9
  Quickbooks ....................................................................................................................... 9
  Authorize.net .................................................................................................................... 10
  RegOnline ......................................................................................................................... 10
  MailChimp ....................................................................................................................... 10
  Wordpress ......................................................................................................................... 10
  Basecamp ........................................................................................................................ 11
  GoToMeeting .................................................................................................................... 11
  SurveyGizmo .................................................................................................................... 11
  Google Email/Calendar .................................................................................................... 11
  Conclusion ......................................................................................................................... 11

WHAT UEDA WANTS ......................................................................................................... 12
  Phase I: Membership Management Solution Functionality ................................................ 12
  Phase II: Additional Functionality ..................................................................................... 13

HOW TO SUBMIT A PROPOSAL TO UEDA ..................................................................... 15
  Proposal Format and Outline ............................................................................................. 15
    Format .............................................................................................................................. 15
    Outline ............................................................................................................................ 15
  Evaluation Criteria ............................................................................................................. 19
  Selection in UEDA’s Sole Discretion ................................................................................. 20
  Timeline ............................................................................................................................. 20
  Submission Process .......................................................................................................... 20
  Other Considerations ........................................................................................................ 21
Abstract

The University Economic Development Association (UEDA) is seeking a partner to build and implement a comprehensive customer relation management (CRM) system that incorporates existing and desired functionalities as relevant and useful to the Association’s needs. As a non-profit, membership organization with a volunteer Board of Directors, UEDA is committed to the ongoing development and improvement of membership engagement and benefits. UEDA has translated this commitment into six primary goals it seeks to achieve through this proposal process and subsequent partnership.

UEDA’s goals and expectations for the CRM system are as follows:

1. Administrative efficiency;
2. Better/accurate reporting;
3. Ease to the end user/member;
4. Increased member benefits;
5. Creation of a single data warehouse with the most accurate and clean data possible; and
6. “Learning Exchange” Capability (collect, organize, and make available content / material on economic development / engagement subjects)

As UEDA reviews incoming proposals, these goals will stand at the forefront of conversation and importance in gauging a vendor’s capability.
About the University Economic Development Association

Established in 1976, the University Economic Development Association (UEDA) is the cornerstone membership organization representing higher education, private sector, and community economic development stakeholders. UEDA works to expand economic opportunity in our communities by leveraging research, community resources, campus planning, talent development, and technology commercialization.

Mission

UEDA’s mission is to serve its members by enhancing members’ abilities to deliver economic development benefits through engagement with higher education.

Vision

UEDA will be recognized as the pre-eminent association for higher education engagement in economic development.

UEDA is a 501(c)(3) nonprofit organization with approximately 200 members representing the college and university-related economic development sector, including nonprofits, community economic development organizations, and for profit companies. Its core membership is comprised of U.S. institutions of higher education. More information is available at www.universityeda.org.
UEDA’s Infrastructure

UEDA’s Team
The UEDA Board of Directors consists of fifteen individuals from higher education institutions and private sector groups from across the country. Board members chair the organization’s committees, as well as work closely with the organization’s executive staff from Fourth Economy Consulting (FEC), a firm based in Pittsburgh, PA.

UEDA members have the opportunity to join one of the many UEDA Committees. The Committees develop the programs, policies, events, and recognitions that help advance the mission of UEDA. Committee work is an exciting way for members to contribute to the organization and to meet peers from around the country. The current UEDA Committees include the following:

- Summit Planning Committee
- Development Committee
- Awards of Excellence Committee
- Marketing Committee
- Membership Committee
- Body of Knowledge Committee
- Board Nominating Committee

Visit the UEDA website for details about each committee.

Committee Usage
Each committee will vary in its usage of the CRM system. For a few example scenarios (these examples are not exhaustive of each committee’s needs), the Summit Committee may primarily seek tools for event management and agenda development. The Development Committee will likely need assistance in tracking communication with potential sponsors, advertisers, and grant sources. The Awards of Excellence Committee collects online applications, and has several awards categories to track and maintain. The Marketing Committee will be developing content for email blasts, website maintenance, and communication outreach. The Membership Committee will need to track new, existing, and potential members, with an easy-to-use database that houses an identified point of contact, up-to-date information about payment of annual dues, etc. The Body of Knowledge Committee creates and collects quality content for our members, and will need an e-library database for easy access and distribution to UEDA members. The Board Nominating Committee needs a tracking and communication system for members who may potentially serve in a leadership position with the organization.
Types of Users

Within the CRM system, several distinct roles will exist to differentiate among the types of users. The number of unique roles, and the likely breakdown as it relates to UEDA’s members and non-members is briefly described below, though is subject to change based on recommendations and structural needs from the vendor and system, respectively.

System Administrator: These users will have the control and authority to do virtually everything within the CRM system. Such open access will likely only be given to a select few individuals – most likely FEC staff.

Board Member/Committee Chair: These users will have greater authority with material that is specific to the committees they are leading. Since the committees vary in purpose and content, it may be necessary to further break down this role into unique roles for each committee chair.

Board Member: These users will have similar access to the CRM content as the system administrator, but certain sections will be “read only,” to prevent unintended changes to sensitive information.

Committee Member: These users will be individuals who serve on a committee but are not on the Board. Specific access to their committee’s material will be critical, while access to other internal information may not be relevant.

UEDA Voting Member: These users will have limited access to the CRM system, with the primary focus of giving them the ability to edit and update their profile, as well as that of their organization. They will also have the ability to vote, and be given access to specific information.

UEDA Non-Voting Member: These users will mirror the UEDA Voting Member role, but without the capability to vote, and the individual will not be able to edit the organization’s profile.

Non-member/Public viewer: These users will be anyone who visits UEDA’s website as an unidentified viewer. Access will only be for public material, with an emphasis on encouraging the non-member to become a member. Under this category, very limited information about the Association and its operations will be accessible. For example, contact information for members will not be provided to ensure limited data mining for commercial purposes.

*These roles are subject to change based on the phases of implementation and the CRM functions UEDA ultimately seeks from this proposal.
UEDA’s Membership

Membership
UEDA has approximately 200 members representing the colleges and university-related economic development sector, including nonprofits, community economic development organizations, and for-profit companies. Its core membership is comprised of U.S. institutions of higher education. These members pay the following annual membership fees to participate in the national organization:

- **Institution Membership**: $495 (One voting and three non-voting individuals)
- **System Membership**: $1,600 (One voting individual for the system; Three non-voting individuals for the system, four additional campuses, each with one voting individual and three non-voting individuals, additional campuses may be added at $300 per campus)
- **Retiree Membership**: $100 (One voting individual)
- **Student Membership**: $50 (One voting individual)

Membership Benefits for All Levels of UEDA Membership:

- Receive regular news and information impacting UEDA initiatives and issues
- Collaborate with private sector, higher education, and economic development policy leaders
- Become eligible for the UEDA Awards of Excellence recognition
- Receive member discounted rates for UEDA’s annual summit, workshops, and programming
- Collaborate on grants and regional initiatives with member organizations
- Contribute editorial content to UEDA’s newsletter and blog
- Gain access to UEDA Job Board and Posting
- Share and participate in Best Practice competitions
- Present at the Annual Summit

UEDA categorizes its membership base into three groups:

**Higher Education and Research Organization Members**

Higher education institutions, research centers, federal labs, and affiliate organizations represent the fuel for the modern economy: Talent, Innovation, and Place. Together, these resources form the core of UEDA membership. They create new businesses, reinvent legacy industries, and strengthen the communities and regions these institutions call home. Colleges, universities, and related organizations join UEDA to share best practices, expand
domain expertise, and build new partnerships with private industry, government agencies, and the economic development community.

**Economic Development Organization Members**

Economic development organizations often serve as intermediaries among higher education, the private sector, and government. In today's knowledge-based economy, universities and economic development organizations work hand-in-hand to apply specialized financing tools, define new performance metrics, accelerate university spinoffs, and engage in place-based strategies required to attract and retain young professional talent and innovating businesses. UEDA has successfully recognized communities that excel at leveraging town-gown partnerships by highlighting the technical resources and approaches that help make them happen. This recognition attracts national attention and can lead to greater business investment, market sustainability, and higher real estate values.

**Private Sector Members**

The private sector has always partnered with universities for research, talent, and technology resources. In today’s economy, private sector experts in planning, engineering, R&D, finance, and real estate development are increasing their engagement with higher education institutions to adequately prepare the next generation of employees, increase their competitive edge for federal funds, license and commercialize technologies, and advance campus development projects. UEDA works to facilitate private sector connections with higher education through networking events, summits, expositions, technical programming, and sharing best practices.

**UEDA Summit Attendees**

While the primary users of the system will be Fourth Economy Consulting, the UEDA Board of Directors, and UEDA committee members, it is possible that all UEDA members will gain access to a members-only component for sharing relevant information. To better understand UEDA’s audiences, here is a list of the types of individuals who participate in the UEDA Summit and whose organizations are UEDA members:

College and University Presidents & Deans; Provosts & Outreach Officers; EDA Center Directors; External & Government Affairs Administrators; Innovation, Commercialization & Technology Transfer Directors; Officials from Higher Education System Offices; Economic Developers; Economic Development Consultants; Market Development Specialists; Federal Agency Program Directors; State and Federal Grant Administrators; Manufacturing Extension Partnership Directors & Managers; and Workforce Development Directors.
What UEDA Currently Uses

UEDA currently uses a variety of tools to implement its vision and mission. We’ve outlined these items below, indicated any interactivity between the tools, and attempted to define the process to update and manage these tools.

Highrise

Highrise is UEDA’s existing CRM system. As member data change, manual updates are made to Highrise records to ensure accurate data. When Fourth Economy Consulting (FEC) assumed the management role of UEDA, all data were cleaned and normalized. Since then, with multiple administrators both inside and outside of UEDA’s offices, the data no longer are clean. UEDA has also attempted to capture custom data (EDA region, social media sites, etc.) using custom fields in Highrise. All records are tagged to indicate audience levels, engagement points with UEDA, and custom lists. Current tags in use include:

2014 No Longer; ALPU-CICEP; APLU-CICEP; Awards Finalist 2012; Awards Finalist 2013; Awards of Excellence Committee; Billing; Board Member; Body of Knowledge Committee; Canada 2013; Executive Committee; Former; Lead – Exhibitor; Lead – Membership; Lead – Sponsor; Lead 2013; Mailchimp; MAP; Member; Membership Committee; MEP; New Member 2012; New Member 2013; New Member 2014; Non-Voting; NSF; Partnership Committee; Returning; Strategic Communications Committee; Student; Summit Attendee 2011; Summit Attendee 2012; Summit Attendee 2013; Summit Planning Committee; Summit Speaker 2012; Summit Speaker 2013; Summit Sponsor 2011; Summit Sponsor 2012; Summit Sponsor 2013; Voting

Challenges in UEDA’s use of the Highrise system include: Multi-list segmentation; ease of management; mass updating of records; attribute sharing for individuals at the same organization; integration with online profiles/login; interactivity with other tools; pulling reports.

Quickbooks

UEDA uses Quickbooks to manage all accounting for the organization. Quarterly, UEDA generates new invoices to members who have outstanding dues via the Quickbooks system. Billing contacts are manually added into the Quickbooks system based on the email address located at the Organization-level in Highrise. As invoices age in the system, Quickbooks is used as a reminder about the past-due amount. Invoicing for other items (sponsorships, event registrations, etc.), is entered manually into Quickbooks and processed accordingly. Any updates to member status into Highrise (e.g., a member decides not to renew), is completed manually. Payments made through UEDA’s online bank/payment portal (Authorize.net) are reconciled manually in Quickbooks. UEDA has the need, based on varying university payment systems, to offer credit card transactions and generate invoice/send check options for any accounting transaction.
Challenges in UEDA’s use of Quickbooks system include: Integration with other tools; manual manipulation of data.

**Authorize.net**

UEDA uses Authorize.net as the online payment portal for all credit card transactions, except those processed via RegOnline. Currently, transactions are processed through UEDA’s website for memberships (user completes web form and is presented an option to pay via credit card or check). The credit card selection takes the user to the Authorize.net portal for processing. Authorize.net is also used to process payments on the fly, for processing sponsorships, and other custom price-points. UEDA has recently developed a custom payment page (http://universityeda.org/payment/) where users can enter an amount to pay. This is used primarily for sponsors at various giving levels.

Challenges in UEDA’s use of Authorize.net include: Ability to easily set up custom payments; integration with other tools.

**RegOnline**

UEDA uses RegOnline for processing of event registrations online. Currently, UEDA conducts two events that deal with the use of this tool (Spring Meeting and Annual Summit). The tool itself is very robust and meets the needs of UEDA. Using an email address as a unique identifier, the system requires users to recall their password (some from a year ago, or more) in order to access the tool. Payments are processed within the RegOnline system and then a check sent to UEDA, less an administrative fee based per registration.

Challenges with UEDA’s use of RegOnline include: Seamless/easy end user experience for registration of various UEDA items (e.g., events, webinars, etc.); integration with other tools.

**MailChimp**

UEDA uses MailChimp as its main communications tool. Regardless of where communications list data are housed, they are brought into MailChimp for communications processing. For Highrise, an API is used to pull the current, appropriate list against a single “tag.” For event-related information, data are downloaded from RegOnline and imported into MailChimp on a per-event, per-communications basis.

Challenges in UEDA’s use of MailChimp include: Integration with other tools; ability to segment audiences (however this is seen as an issue with Highrise more than MailChimp).

**Wordpress**

UEDA’s website contains a Wordpress backend (version 3.7.4) utilizing the U-Design theme.
Challenges in UEDA’s use of Wordpress include: None. However, there is desire to have members-only pages under login.

Basecamp
Basecamp is used, in conjunction with Highrise, as UEDA’s project management tool. All committees have a “project” set up in Basecamp and use this for communication, file, sharing, etc.

Challenges with UEDA’s use of Basecamp include: None. However, this product is tied to Highrise.

GoToMeeting
UEDA uses GoToMeeting for all monthly online committee and board meetings. Currently, there are eight regular meetings with occasionally smaller meetings occurring that use the system. GoToMeeting is also used for an annual webinar to share updates regarding the organization’s Awards of Excellence program.

Challenges in UEDA’s use of GoToMeeting include: Seamless end user registration experience; integration with other tools.

SurveyGizmo
UEDA uses SurveyGizmo to poll the membership on various topics. Approximately 2-3 surveys are conducted per year. Surveys are generally sent out, via a link, using MailChimp, to the appropriate audience.

Google Email/Calendar
The UEDA staff utilizes the Google suite of tools for administration of email and calendars, including sending out meeting invitations to committees, etc.

Conclusion
Obviously, UEDA’s data are scattered in various systems and the management of data between systems has become inconsistent and unruly.

UEDA is not tied to any of these solutions for the long-term and is open to a full service solution that may or may not include the continuing use of these products. Vendor proposals should specify any proposed consolidation of products, tools, or data, and explain potential efficiencies and other concrete benefits of the system/ solutions being proposed.
What UEDA Wants

A selected vendor should work to understand UEDA’s processes, consolidate where appropriate, and streamline the administration of these tasks throughout the organization, with the goals of:

- Administrative efficiency;
- Better/accurate reporting;
- Ease to the end user/member;
- Increased member benefits;
- Creation of a single data warehouse with the most accurate and clean data possible; and
- A Learning Exchange” Capability (collect, organize, and make available content / material on economic development / engagement subjects)

UEDA is seeking a CRM solution that efficiently, effectively, and affordably facilitates comprehensive association membership and management functions that are currently being supported by Fourth Economy Consulting, UEDA’s management firm, using multiple software systems as indicated in “What UEDA Currently Uses.”

While we have attempted to outline all system requirements below, we are looking to the selected vendor to understand current UEDA data and workflows and propose a solution(s) that meets the stated goals above. While not all of the requirements listed below may be able to be satisfied by a single solution, UEDA seeks to condense and connect as many of these tools as possible to maximize efficiency and minimize data replication.

At a minimum, UEDA is seeking a solution to meet all requirements listed in the “Phase I” section below. We have also identified additional functionalities, which are other items not immediately required as part of this project's “Phase 1,” and are considered “Phase II: Additional Functionality.” UEDA recognizes, however, that this future development is important to consider in developing a scope of work and solutions for Phase I. If a vendor chooses to include any features listed under “Phase II,” please indicate these as separate line items in the proposed budget.

Phase I: Membership Management Solution Functionality

UEDA seeks a membership management solution that will serve as the core data repository and allows for the following public user features:

- Apply for membership
- Pay for membership
• Renew membership
• Self-manage profile
• Manage multiple users at the member institution
• Access members-only section of website
• Create logins for all users (password protected)
• Field-based search for other users/members/institutions
• Event registration
• Job board posting
• Discussion groups

This also requires the following administrative user functions:

• Membership query and reporting
• Custom reporting
• Member segmentation
• Activity/engagement tracking
• Accounting (invoicing, tracking, etc.)
• Online email marketing services including automation, website content generation (e.g., Awards of Excellence content, event sponsors, etc.)
• Committee member segmentation/communication/document sharing
• Lead tracking
• Campaign management
• Social media integration

Phase II: Additional Functionality

Body of Knowledge Library and Online Journal
UEDA wishes to create a section of the website for a Body of Knowledge library, where resources can be uploaded and categorized by administrators and users for posting to the site. It is likely that one part of the Body of Knowledge function will be organized as an “online journal” with refereed and edited publications. Additionally, as a related but possibly separate function, UEDA’s users (via a members-only login) can post “unreviewed and unedited” self-authored documents to the library for review by other members of the organization. Documents can be commented on, marked up, rated, and returned to the author for consideration. Unique login profiles should also offer users the ability to customize alerts and subscriptions to filter through content within the library and journal. In considering this function, think of Yelp and A.nnotate.com merged together.

Grant Opportunities
UEDA wishes to create a section of the website where users can post and search for open grant opportunities, as well as form collaborative teams to respond to opportunities.

**Research Opportunities**
UEDA wishes to create a section of the website where users can post/search research opportunities.
How to Submit a Proposal to UEDA

UEDA is looking for a detailed outline and creative ideas on how the CRM can be executed, sustainable, and customized for the Association. Established relationships and/or ideas for partnerships are important.

Proposal Format and Outline

Format

All proposals must be submitted in the format outlined below. The main proposal portion of vendor submissions should be **no more than 20 letter-size pages in a readable 12 point font size**. The title page, budget page, and a cover letter will not be counted toward this limit. Attachments (providing supporting information) will not count towards this limit, but please include only the Attachments (Support information) that are specifically required or permitted (See Section _4 Attachments) and direct UEDA to online resources, where appropriate, for other information, to limit paper waste.

The proposal must be delivered as a PDF file. Please follow the following format specifications:

- Page size: 8.5 x 11 inches (vertical or horizontal)
- Font size: no smaller than 12 points
- Maximum proposal length: 20 pages for the main proposal content (does not include title page, cover letter, budget page, or required and permitted attachments)
- Graphics: optimized for quick page loading on the PDF
- URLs: active links within the PDF

Outline

Your proposal MUST follow the outline described below:

1) **Cover Letter** - Include your company name, address, web site, telephone number, and primary contact person with e-mail, direct line and mobile/phone numbers. The cover letter should be signed by an agent, owner or authorized officer of your company.

2) **Proposal Narrative** - Limit of 15 pages and should include:
   a) **Summary** - Provide a (maximum) one-page summary of your proposal.
   b) **Qualifications** - Provide a brief description of your company's structure, expertise and experience in CRM design, development, and management. Your qualifications should at least include:
i) Company Profile - Length of time in business, founders/owners, number of full-time employees, organizational capacity, technology, hosting and/or server capacity, equipment, partnerships, vendor or licensed arrangements, and other unique attributes.

ii) Statement of Relevant Experience – An overview description of your experience with designing, customizing, implementing, and supporting CRMs for clients, and especially for membership associations. Be sure to describe what makes your products and services different or better than those of your competitors?

(1) Attachment: List of relevant current and past clients (limited to one-page).

For each, list the “project title” and the client organization’s name.

(2) Attachment: References for three former or current clients. These should include names of the clients and the projects; names/titles of the client contact persons; and contact information for those contact persons, and is limited to one-page.

(3) Attachment: Relevant project experience examples - a selection of up to five best CRM implementations you have completed that are comparable or relevant to the work described in this RFP. In each case, describe the goals/challenges; your approach, roles, and solutions; the budget; and the time frame (with actual dates) that was required for completion. Provide a link to the website for each project. These are limited to one page each, or five total pages.

iii) Personnel and Project Management - Describe the team you propose to lead, perform, and manage this project. Provide the names, titles, and role(s) in the project for each team member (may be in the form of an organization chart and/or narrative). Indicate the “Project Manager” (expected to serve as the team leader; person responsible for quality of services; and main point of contact). Provide bios for each team member (as attachments).

(1) Attachment: Each bio is limited to one-page.

iv) Terms and Conditions - Describe your procedures for invoicing your clients and any payment procedure/requirement. Describe any other important business terms or conditions that you propose for your relationship with UEDA.

c) Approach to Delivering UEDA’s Scope of Work - Describe your Approach to creation of the UEDA CRM.

i) Overview. Provide an overview of your approach and methods.

ii) Discovery and Scope Confirmation Process. Describe your discovery process for working with UEDA leadership / staff to review and confirm or refine UEDA’s requirements, including such elements as:

(1) Strategy and objectives;
(2) The look and feel of user interface and user navigation;
(3) Functions and capabilities;
(4) Selection, application, or customization of the technology;
(5) Hosting;
(6) Administration; and
(7) Other issues mentioned in this RFP.

UEDA understands that during the Discovery and Scope Confirmation part of the project, the selected vendor’s scope of work may change. Any changes to the approach, costs, and schedule provided in the original proposal that occur from this Discovery and Scope Confirmation will be by mutual agreement of UEDA and the selected vendor.

iii) Development. - Describe your process and standards for developing a CRM system for UEDA—up to and including “going live.” Include:
(1) Technology - Describe the technology specifications you will recommend and guarantee for the UEDA CRM system. Your technology discussion should include:
   (a) Hosting - Where and how do you recommend hosting the CRM? Describe datacenter location, Internet connection, server capacity and disk space, climate/humidity/fire controls, power backup, daily database backup, technical support, uptime guarantee, disaster recovery and other relevant specs.
   (b) Security - Describe how you will develop the CRM to prevent security breaches.
(2) Testing - Describe your process for and criteria for testing the CRM.
(3) Training - Describe your process for training UEDA staff on content management and site administration.

iv) Post-Development Technical Support and Maintenance - Describe how you will provide ongoing technical support and maintenance. What is your response time to routine questions and requests? What is your after-hours policy? What is your disaster-recovery approach?

v) Warranty - Describe the warranty you provide.

d) Timeline. - Provide a timeline for the stages, milestones, and deliverables of the project. Make sure that you give a date by which you believe the new UEDA CRM will go-live and the old system transferred over. We are looking for a reasonable go-live date with adequate time for discovery, design review, development, testing, and training.

3) **Budget and Fees** - Provide a one-page budget for this project. Your budget must encompass all design, production, programming, software licenses or acquisitions, sub-
contractors and third-party or vendor fees for development and for maintenance of the CRM for one year following completion of the project. Include:

a) Discovery and Development Fees – Including the Discovery and Scope Confirmation (“Discovery”) work and also for your development, design, and programming for the UEDA CRM—up through the CRM going live. Include fees for the candidate and any subcontractors. Provide these fees as lump sum amounts for portions of the Discovery and Development work.

b) Reimbursable Expenses—Discovery and Development Phases. – Indicate any expenses you expect to be reimbursed, e.g., for travel, administrative costs, licenses, software acquisitions, vendors, or hosting costs.

i) For licenses, please describe all terms fully. Are they one time or annual? Are licenses tied to number of users (concurrent or non-concurrent)? If so, what is the cost for additional users, if any? And so forth.

Note: UEDA will reimburse expenses only at 100 percent of actually-incurred expenses, and only based on vendor-paid invoices or receipts that are provided with the vendor’s invoices to UEDA. UEDA will not pay any “mark-up” on expenses. Candidates should indicate the basis for estimating the Reimbursable Expenses and provide a “not-to-exceed cap” (which may include a line item for a reasonable amount of expenses “contingency”).

c) Maintenance and Support Fees. - Your estimated fees for one year of routine maintenance and technical support. Is this a flat monthly fee? Hourly, and if so what are the rates? After-hour support? Do you have packages? What is included and what is excluded?

d) Reimbursable Expenses—Maintenance and Support Phase. Provide the same information as described above under (b).

e) Costs for Additional Work. – Provide your costs for any additional work or consulting that may be required or desired / optional above and beyond this scope. You may state this as a “menu” of work/services with associated costs, or as hourly rates for specific personnel who would be involved, or both, if applicable.

4) Attachments - Include attachments as follows:

a) List of clients (required)

b) References with contact information (required)

c) Relevant Project Examples (required), up to five; one page each

d) One-page bios of personnel who will work on the project (required)

e) Firm Profiles and Services Provided for any subcontractor firms (one page per firm)

f) Technical descriptions of relevant software, hosting environment, or other technical information (brief as possible)
**Evaluation Criteria**

The following criteria will form the basis upon which UEDA will review and evaluate proposals.

- **Relevant Experience (10 points):** Candidate firm has successfully completed similar projects and references / contact persons provide evidence of satisfactory experiences with the vendor.

- **Expertise and Skills in Technology, Programming, and Development (15 points):** Candidate has the personnel with the right skill sets, experience, and knowledge base for carrying out all aspects of the project. We will evaluate the depth and breadth of capacities of both vendor staff and subcontractors.

- **Warranty (5 points):** Candidate is confident enough in the quality of its technologies and services to warrant its deliverables for a certain period of time.

- **Approach to Meeting UEDA’s Scope of Work (20 points):** Candidate has thoughtfully described the approach and tasks/process for development and switching to the new CRM; the recommendations for enhancements; hosting and ongoing IT recommendations; and the ease of UEDA’s management and administration of the system after it is delivered. UEDA is seeking a vendor/partner that has the ability to meet or exceed the stated goals.

- **Budget (15 points):** Candidate has proposed a competitive but realistic budget for design and development, reimbursable expenses, and post-development monthly technical support and maintenance.

- **Timeline (10 points):** The candidate has proposed a reasonable timeline, including stages for discovery, development, and testing.

- **Service, Partnership, and Compatibility (25 points):** Based on the proposal and interviews, the candidate demonstrates a high level of personal service, passion, and enthusiasm for the project. The proposal will also be judged on a compatibility and partnership factor, i.e. good “chemistry” and long-term fit between the candidate and UEDA.
Selection in UEDA’s Sole Discretion

While UEDA will follow and apply the evaluation criteria provided herein, the final selection of a vendor will be made based on UEDA’s sole judgments.

UEDA reserves the right to negotiate with one or more proposing organizations.

UEDA reserves the right to not award a contract to any candidate responding to this RFP, if it finds that a suitable vendor and proposal have not been identified.

Timeline

The following timeline will be utilized for the purposes of adequate review and approval of proposals:

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 22, 2014</td>
<td>RFP Released</td>
</tr>
<tr>
<td>January 6, 2015</td>
<td>Noon EST: Questions due to UEDA*</td>
</tr>
<tr>
<td>January 13, 2015</td>
<td>1:30pm EST: UEDA Webinar to answer questions.</td>
</tr>
<tr>
<td>January 14, 2015</td>
<td>Question answers and Webinar posted on UEDA website</td>
</tr>
<tr>
<td>January 30, 2015</td>
<td>Proposal due to UEDA headquarters</td>
</tr>
<tr>
<td>February 2-6, 2015</td>
<td>UEDA CRM subcommittee reviews proposals</td>
</tr>
<tr>
<td>February 9-13, 2015</td>
<td>Candidate interviews and online presentations</td>
</tr>
<tr>
<td>February 18, 2015</td>
<td>UEDA CRM subcommittee recommendations to the UEDA Board of Directors for approval</td>
</tr>
<tr>
<td>February 27, 2015</td>
<td>UEDA notifies all applicants of proposal status</td>
</tr>
</tbody>
</table>

*Questions about this RFP must be made in writing to UEDA via email at info@universityeda.org by noon EST on January 6, 2015. Applicants are strongly encouraged to participate in the UEDA Webinar, to ensure they receive all of the updated information. Register for the webinar.

Submission Process

Prior to submission, the vendor must register with UEDA via the webinar registration. Webinar attendance is not mandatory, but it is strongly encouraged. All questions and communication about this RFP will be posted at the link below and sent to the list of registrants.
UEDA requests two (2) hard copies and one (1) electronic copy of the proposal be submitted. The hard copy should be mailed to:

University Economic Development Association  
Attn: CRM RFP  
1501 Preble Avenue  
Pittsburgh, PA 15233  
216.200.UEDA (8332)  
info@universityeda.org

A PDF copy of the proposal, which includes Budget and attachments, should be submitted to info@universityeda.org with the subject line “CRM RFP.” All hard copies and electronic copies of the proposal should be received no later than 5:00 PM EST, January 30, 2015.

Other Considerations

UEDA is not responsible for time reimbursement pertaining to the development of a proposal in response to this solicitation.

This request for proposals will be located and posted to the UEDA website (www.universityeda.org) and will be located at http://universityeda.org/ueda-crm-request-for-proposals/. Any responses to questions, as well as amendments to this RFP will be posted to this section of the website. Additional notification will be added to the UEDA blog, which displays the homepage of the website. Respondents are responsible for checking this resource to ensure the most up-to-date information is included as part of their response.