



Request for Proposal

Cloud-Based Customer Relationship Management (CRM) System For the Business Resource Network

INQUIRIES SHOULD BE DIRECTED TO:

Becky Powers, Chief Financial Officer
Capital Area Michigan Works!
bpowers@camw.net

GENERAL INFORMATION

A. DESCRIPTION OF ENTITY

Capital Area Michigan Works! (CAMW!) is a local unit of government formed under Michigan Public Acts 7 & 8 of 1967 (Ex.Sess.) through an Urban Cooperation Act Agreement. CAMW! is the administrative entity for delivering state/federally-funded programs to strengthen workforce development in Clinton, Eaton, and Ingham Counties in Michigan.

The primary purpose of the CAMW! American Job Centers are to provide labor exchange and workforce development services for employers and job/career seekers. Connecting with Business. Strengthening our Workforce.

A major focus of CAMW! is to strengthen the regional economy by assisting employers in finding and retaining qualified employees, and by assuring the labor force meets the needs of the employers.

B. PURPOSE

This Request for Proposal (RFP) is for procuring a professional services firm to help with the creation, design, deployment, automation of an easy to use, comprehensive and customizable cloud-based Customer Relationship Management (CRM) System. The CRM will be used for the purposes of managing and reporting sensitive business and case management data.

C. RFP STIPULATIONS

As a recipient of Federal and State funds, CAMW! must procure on an open, competitive basis. A quote must clearly set forth all responses in the format required by the RFP in order to be considered. Any proposals may be rejected in whole or in part. CAMW! reserves the right to rescind this RFP in whole or part. CAMW! shall not be responsible to any bidder or potential bidder for any costs incurred or opportunities lost in responding to this RFP or in deciding not to respond.

To ensure the integrity of this procurement, bidders shall make special efforts to prevent fraud and other abuses. Fraud includes deceitful practices and intentional misconduct such as willful misrepresentation. "Abuse" is a general term that encompasses improper conduct that may or may not be fraudulent in nature. While federal legislation is not specific, possible problem areas could include the following: conflict of interest, kickbacks, bribes, nepotism, political patronage, political activities, and sectarian activities. Bidders that are found to violate the abuse standards will be

disqualified. Bidders are required to report immediately any violations in these areas or in problem areas that may later be defined.

Information provided by a proposer that is willingly, knowingly and purposely false, inaccurate or misleading, will be grounds for not considering a proposal for funding, for not awarding a contract, or for canceling a contract if awarded.

Any bidder that attempts to exchange information with any other potential bidder for gaining competitive advantage shall be subject to disqualification. In addition, any bidder who attempts to discuss its proposal with, or offer anything of value to any CAMW! officer, director, staff person, agent or representative during this procurement process, shall be subject to disqualification.

CAMW! operates an equal opportunity procurement process. Upon request, CAMW! can make this RFP available in large print or alternative format. Auxiliary aids and services are also available upon request to individuals with disabilities. TDD Service available through the Michigan Relay Center at 1-844-578-6563 or 7-1-1.

Neither the proposer nor anyone, with whom the proposer shall contract, shall discriminate against any person employed or applying for employment concerning the performance of the proposers' responsibilities under this agreement.

The successful bidder shall be required to comply with all applicable federal and state laws prohibiting discrimination on the basis of race, color, religion, sex (including pregnancy, childbirth and related medical conditions, sex stereotyping, transgender status, and gender identity), national origin (including limited English proficiency), age, disability, genetics, familial status, veteran status, height, weight, arrest without conviction political affiliation or belief, or any characteristic or activity protected by Federal or State laws and regulations.

1. Disclaimer/Right to Reject/Cancel/Terminate

This RFP does not commit Capital Area Michigan Works! to award a contract, to pay any cost incurred in the preparation of a proposal to this request, or to procure or contract for services. CAMW! reserves the right to accept or reject any or all proposals received as a result of this request. CAMW! can cancel this RFP, in part or in its entirety, if it is in its best interest to do so.

CAMW! may require selected offerors to participate in negotiations, and to submit such costs or other revisions to their proposals as a result of negotiations. CAMW! is not liable for costs incurred by the offerors prior to the signing of a contract and/or written authorization from CAMW! to proceed with the services.

a) Termination Prior to Completion:

CAMW! reserves the right to terminate its commitment if the successful bidder fails to make sufficient progress toward completion of the project or if CAMW! receives funding reductions which make the proposed project unfeasible. The determination of the sufficiency of grounds for termination under this clause shall be within the sole discretion of CAMW!

2. Small and Minority Owned Businesses, Women's Business Enterprises

Capital Area Michigan Works will make an effort to utilize small and minority owned businesses, women's business enterprises and Labor surplus area firms when possible.

An Offeror qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 CFR 121.201), by having average annual receipts for the last three fiscal years of less than six million dollars.

3. Award

CAMW! reserves the right to request additional data or to request an oral presentation in support of written proposals.

Upon conclusion of final negotiations with the successful bidder, Capital Area Michigan Works! may award a contract, based on offers received, without discussion of such offers. Accordingly, each offer should be submitted on the most favorable terms from a price and technical standpoint.

Please do not contact Capital Area Michigan Works! to check the status of proposals.

4. RFP Appeal Process

A bidder wishing to appeal the decision of the award must adhere to the following procedure:

A bidder can request a copy of the proposal rankings. The rankings will be emailed or mailed to the bidder if requested in writing within five (5) working days after a decision is reached.

An appeal will not be accepted if it attempts to modify or include additional information to the original proposal. However, in the event incomplete, inaccurate or other than current data and information was entered into the evaluation process by CAMW!, CAMW! may rectify such errors prior to initiation of Step #2. Current is defined as data and information in the possession of CAMW! at the time of the submission of the original proposal.

a. Review and Appeal Process

Step #1 - Within five (5) working days after a decision has been rendered to accept a proposal, the appellant must submit a request in writing that their proposal receive a second review. The appeal for the review shall state the basis of the appeal.

The request for the second review must be received by CAMW! no later than the close of business on the fifth working day after the decision has been rendered.

Step #2 - Within fifteen (15) working days of receipt of the request for the second review, the Chief Executive Officer of CAMW! (or designee) will convene:

- (1) CAMW! staff member(s) who wrote and/or reviewed the original proposal; and
- (2) Representative(s) of the bidder's organization, and, at the discretion of the CEO an option to include:
- (3) The Administrative Board chair

The Chief Executive Officer of CAMW! (or designee) will chair the meeting. The purpose of this meeting is to provide a second review of the appellant's proposal based on information presented in conformance with paragraphs above.

Step #3 - Within five (5) working days after the meeting in Step #2, the staff member(s) who wrote and/or reviewed the appellant's proposal will prepare a final determination. The appellant will be notified in writing, within these five (5) working days following the outcome. The final determination notification may be shared with the Administrative Board at the discretion of the CEO.

D. SPECIFICATIONS:

The deliverables shall be based on a firm price for services that would address the creation, design, deployment, and automation of an easy to use, comprehensive and customizable web/cloud-based Customer Relationship Management System (CRM). The CRM will be used for the purposes of managing and reporting sensitive business and case management data. The applicant shall demonstrate the following minimum objectives:

- Must be able to capture and report business, employee and job retention metrics in multiple ways. If we can gather the data, we should be able to report and calculate the data in any and all configurations.
- Must be able to tie employees to each of the businesses for which they work.
- Must be able to not only capture business and employee data, but to also capture case management notes and metrics.
- Must be able to guarantee the information is secured and will not be sold or accessible to a third-party outside of Capital Area Michigan Works!
- Capital Area Michigan Works! will own the data.
- Must be able to migrate all current data from a .CSV format.
- Must be adaptable and managed through a cloud-based platform (i.e. Salesforce, Insightly, HubSpot, Zoho, Agile).
- Must be able to provide finished CRM system by December 18, 2020.

At a minimum, the following CRM capabilities should be included in the bidder's quote:

1. Cloud-based system and accessible from anywhere:
 - i. Internet capabilities 24/7.
 - ii. Accessible
 - iii. How often is the software updated and releases made available?
2. Administrative access to define and assign different user levels with variable levels of access to the system.
3. Ability to create accounts.
4. Ability to create contacts.
5. Ability to create projects.
6. Ability to create activities.
7. Ability to create custom fields based on user need.
8. Ability to import/export data.
9. Ability to search by keyword.
10. Ability to merge duplicate accounts, projects, activities and contacts.
Search/match duplicate error checking.
11. Ability to integrate with email system (Gmail).
12. CRM users are able to task each other.
13. Create and generate dashboard of key metrics.
14. Create notification tasks.

15. Create new data fields that allow for the collection of specialized data needs:
 - i. Must allow new or editable data fields (such as wage) to be easily added and used as part of data import/export as well as campaigns, communications, tracking, filtering and reporting.
16. Generate reports and ability to customize:
 - i. Reporting ability to save data for trend analysis/historical data.
 - ii. Ability to create ad-hoc reports as needed.
17. Timeline view for future events.
18. Provide reminders of when things are due or need to be started.
19. All lead's information found on one page.
20. Allow concurrent user connection.
21. Application in which to develop and create new changes prior to going to production.
22. Provide data storage limits for record retention.
 - i. What are the options available to increase limit?

Note: The above list contains tasks that are typically associated with this project. It is not all-inclusive.

In addition, please include separate pricing for:

1. Access via mobile devices.
 - How are mobile capabilities implemented? (i.e. mobile-enabled, apps, etc.)
 - How and when are mobile updates provided?
2. Ability to mass email from CRM. Integrate with mass email applications (Mail Chimp, Xero, Constant Contact, Hubspot)
4. Integration with Google Apps (Maps, Docs, Sheets, etc.)

E. INSTRUCTIONS ON PROPOSAL SUBMISSION

1. Closing Submission Date

Proposals must be received hand-delivered or by U.S. mail postmarked no later than **5:00 p.m. on Friday, November 6, 2020.**

2. Inquiries

All questions must be submitted, in writing, no later than **3:00 p.m. on Wednesday, October 21, 2020** to bpowers@camw.net. All questions and answers will be posted in the RFP section of our website at www.camw.org no later than **5:00 p.m. on Monday, October 26, 2020.**

3. Proposals Instructions to Prospective Bidder

Proposals can be submitted via U.S. mail, or hand-delivered to CAMW! **One original and four (4) copies** must be submitted by the deadline date and time as stated above. **NO faxed copies will be accepted. Please sign in upon hand-delivery of proposal to ensure a record of receipt.**

Label package with the following information:

**Business Resource Network CRM Proposal
ATTN: Becky Powers, CFO
Capital Area Michigan Works!
2110 S. Cedar Street
Lansing, MI 48910**

Late proposals will not be considered.

- a. Bidders must respond completely and accurately to any and all questions and other items calling for information. Failure to do so will subject the proposal to disqualification.
- b. Bidders must adhere strictly to the proposal instructions and format. Failure to do so will subject the proposal to disqualification.
- c. Potential bidders will be able to download the RFP from the CAMW! website (www.camw.org)
- d. The following parts specifically require responses and/or signatures from the bidder:

**Part I Cover Sheet and Proposal Offeror Information
(Signature required)**

Part II Contract Requirements (Signature required)

Part III Cost Summary/Proposal Narrative

e. Attach three (3) summaries of similar projects including reference.

f. Describe the Technical support:

- What services are included with the support?
- Are updates included?

g. Describe the Training provided for Admin and end users.

h. Describe the Platform being used (Salesforce, HubSpot, Zoho, etc.).

i. Describe any Optional suggestions to optimize the CRM system.

4. Payment

Capital Area Michigan Works! will negotiate a payment schedule with the vendor awarded a bid. The award will go to the responsible firm whose proposal is most advantageous to CAMW! and programs based on price and other evaluation factors.

PROPOSAL EVALUATION

A. SUBMISSION OF PROPOSALS

All proposals shall include a copy of the bidder's cost and any additional requested materials. These documents will become part of the contract.

B. NONRESPONSIVE PROPOSALS

Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal is not received timely in accordance with the terms of this RFP.
2. The proposal is not adequate to form a judgment by the reviewers.
3. The proposal does not follow the specified format.

C. EVALUATION

Evaluation of each quote will be based on the following criteria:

Factors	Maximum Points
1. EASE OF USE	10
2. COMPLETENESS OF PROPOSED SOLUTION	15
3. TIMEFRAME	10
4. TECHNICAL SUPPORT	10
5. SUMMARIES OF SIMILAR PROJECTS & REFERENCES	10
6. COST	15
Maximum Points:	70

D. Review Process

Capital Area Michigan Works! may at its discretion, request presentations by or meetings with any or all Offerors, to clarify or negotiate modifications to the Offerors' proposals.

However, Capital Area Michigan Works! reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standouts, which the Offeror can propose.

PART I

PROPOSAL TO CAPITAL AREA MICHIGAN WORKS!

PROPOSAL OFFEROR COVER SHEET AND SUMMARY INFORMATION

Organization Name: _____

Address: _____

Contact Person: _____

Phone #: _____ Fax #: _____

Email address: _____

Employer Tax ID: _____ DUNS# _____
(If applicable)

Type of Organization: ☐ Private for Profit ☐ Private Non-Profit
 ☐ Public Government ☐ Other (specify)

The Certification Statement below must be signed by an official authorized to bind the Offeror in a sublease/contract.

Signature

The above signed does hereby accept all the terms and conditions of the Request for Proposal (RFP), including RFP stipulations and specifications. The bidder also certifies that the information in this proposal is correct to the best of its knowledge and belief and the filing of this proposal has been fully authorized by the organization submitting the proposal and that the submitting agency is an Equal Opportunity Employer (if applicable).

Printed Name

Title

Date

PART II

CERTIFICATIONS

On behalf of the Offeror:

The individual signing certifies that he/she is authorized to contract on behalf of the Offeror.

- A. The individual signing certifies that the Offeror is not involved in any agreement to pay money or other consideration for the execution of this agreement, other than to any employee of the Offeror.
- B. The individual signing certifies that the prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for restricting competition.
- C. The individual signing certifies that the prices quoted in this proposal have not been knowingly disclosed by the Offeror prior to an award to any other Offeror or potential Offeror.
- D. The individual signing certifies that there has been no attempt by the Offeror to discourage any potential Offeror from submitting a proposal.
- E. The individual signing certifies that he/she has read and understands all of the information in this Request for Proposal.
- F. The individual signing certifies that the Offeror, and any individuals to be assigned to the organization does not have a record of substandard work and has not been debarred or suspended from doing work with any federal, state or local government.

Organization Authorized Signature

Date

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans and Cooperative Agreements

The undersigned certifies, to be best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, any officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or any employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1325, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for such failure.

Organization Authorized Signature

Date

**Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion
Lower Tier Covered Transactions**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98.510, participants' responsibilities. The regulations were published as Part VII of the May 26, 1988, Federal Register (pages 19160-19222).

- (1) The prospective recipient of federal assistance funds certifies, by submission of this certification, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
- (2) Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this certification.

Organization Authorized Signature

Date

CERTIFICATE OF COMPLIANCE WITH PUBLIC ACT 517 OF 2012

I certify that neither _____ (Company), nor any of its successors, parent companies, subsidiaries, or companies under common control, are an "Iran Linked Business" engaged in investment activities of \$20,000,000.00 or more with the energy sector of Iran, within the meaning of Michigan Public Act 517 of 2012. In the event it is awarded a Contract as a result of this Request for Proposals, Company will not become an "Iran Linked Business" during the course of performing the work under the Contract.

NOTE: IF A PERSON OR ENTITY FALSELY CERTIFIES THAT IT IS NOT AN IRAN LINKED BUSINESS AS DEFINED BY PUBLIC ACT 517 OF 2012, IT WILL BE RESPONSIBLE FOR CIVIL PENALTIES OF NOT MORE THAN \$250,000.00 OR TWO TIMES THE AMOUNT OF THE CONTRACT FOR WHICH THE FALSE CERTIFICATION WAS MADE, WHICHEVER IS GREATER, PLUS COSTS AND REASONABLE ATTORNEY FEES INCURRED, AS MORE FULLY SET FORTH IN SECTION 5 OF ACT NO. 517, PUBLIC ACTS OF 2012.

(Name of Company)

By: _____

Date: _____

Title: _____

Subscribed to and sworn before me,
a Notary Public, on this ____ day of _____, 20__.

_____, Notary Public

_____ County, State of Michigan Acting in _____ County,
Michigan

My Commission Expires: _____

PART III

A. SUMMARY INFORMATION

	COST
1. Total Professional Service Fee	
Include No. of Hours & Cost/hour	
2. License Fees (5-10 Users)	
3. Optional Items, if applicable:	
4. Technical Support	
Monthly	
Hourly (as needed)	
5. Other Monthly Cost, if applicable	
Hosting	

PROPOSAL NARRATIVE

ATTENTION BIDDERS

PROVIDE ADDITIONAL INFORMATION BASED ON THE SPECIFICATIONS AND INSTRUCTIONS HERE