**MassCEC CRM RFP - VENDOR RESPONSE**

To facilitate the timely evaluation of proposals, a standard format proposal submissions has been developed and is documented in this section. All vendors must address all the information, using the same category headings and explicitly address all questions. Not adhering to this format or addressing all sections and questions provided will result in a lower overall proposal score.

Please also explicitly address the questions as they adhere to the proposed Project Phases (see section 5.1).

**Section 1: Vendor Qualifications and Experience (see section 5.2)**

1. What are your qualifications to meet the needs of MassCEC’s CRM, database and Grants Management objectives?

**Section 2: Quality, project management, and communication**

1. **Quality management approach:**
* Explain your approach and methods for quality management for both implementation and hosting.

1. **Project management and communication:**
* What tools will be used for project management and communication?
* How often will status updates and meetings occur?
* How will your company monitor and confirm communications are working and adjust as needed?
* What are methods your company uses to measure scheduled performance and how will you know when to when to escalate schedule risk

1. **Risk Management:**
* Describe your company’s risk/issue management process.
* Identify some key risks/barriers your company has faced on projects of similar scope/size complexity and how you overcame or mitigated those risks.

**Section 3: Project planning, migration, and integration**

All potential vendors should describe their ability to meet MassCEC’s CRM and Database timeline of having a first version live by December 1, 2025.

1. What steps do you take to ensure timelines and milestones are met to ensure a successful project roll out?
2. **Project plan:** Describe specifically how you would collaborate with MassCEC to support and integrate with MassCEC’s primary data sources, targets, applications, channels and other interface points.

**For # 2 please specifically address the process for:**

* CRM/database migration – including cleaning, mapping, deduplication, conversion, and importing.
* Grants management migration – including cleaning, mapping, deduplication, conversion, and importing.
* Describe your data testing process to ensure data has been completely and accurately migrated.
* CRM/database integration with external applications (Net Suite, PowerBI etc) and the Workforce Development CareerEdge portal (see Scope of Work).
* Grants management integration with external applications – the CRM/database solution + other applications including but not limited to Net Suite and PowerBI.
* In addition, explain how the proposed solutions across different phases (CRM/database + grants management) could replace selected applications and approaches currently used by departments (See Current Business State and Section 5.5).
* Reporting – explain the process for ensuring that the system design aligns with the needed data exports and formats.
* How do you handle change management requests?

**Section 3: Product delivery model**

Describe the delivery model(s) on which the vendor would base the proposed solution. Delivery models for the Platform will be assumed to be SaaS, but other considered delivery models supported by the primary vendor should be highlighted for example:

* On-premises commercial off-the-shelf (COTS) software
* Open-source software (All models)
* Managed services/hosted
* Platform/software as a service (PaaS/Saas)
* Hosting on infrastructure as a service (Iaas)

**Section 4: Architectural and Data Governance Vision**

1. Based on the Product delivery Model, please clarify, ideally via an architectural diagram, the tech stack and associated infrastructure the Platform will live on.
2. Describe the policy, procedures, and standards that govern how data is used and managed.
3. How do you align data architecture with governance policies, standards, and processes?
4. How do you ensure data is managed efficiently across an organization?

**Section 5: Training, Support, and Service Warranty (see section 4.3)**

Please provide answers to the types of training and support you would suggest to meet our needs – please describe different levels of support at different price points.

1. Please describe the support offerings available for your applications and products for migration and onboarding (instructor-led, remote, web-based, Computer Training modules, instructional guides).
2. What post-implementation or ongoing support do you offer (24/7 support via email, chat, in person support provided for complex issues)?
3. If there is an issue (implementation/post-implementation), what is your escalation process?
4. How will new application users be trained going forward and what options exist for refresher training?
5. Describe the technical training that will be provided for team members that might ultimately support and maintain the application(s) or infrastructure.
6. Is there a system/process to alert customers to proactively to bugs/bug fixes that are deployed to the Platform?
7. Describe any developer/user communities in which the primary vendors, technical employees are regularly active and from which support can be obtained?
8. Please provide a copy and description of all warranties associated with the proposed solution support.
9. Describe the mechanisms/processes/facilities in place to assist customers, architects, and developers with best practices relevant to the product. Best practices can relate to development project management, technical architecture and system set up.

**Section 6: Description of Solution and Pricing (see sections 4 and 5)**

Vendors are expected to provide a transparent and detailed breakdown of all costs associated with the CRM implementation and ongoing maintenance. Given our status as a quasi-governmental organization, transparency about fiscal responsibility is paramount. Pricing structures therefore need to be laid out to minimize unforeseen expenditures. We ask vendors to please provide an explanation of the different levels of service that could be provided with different pricing structures – i.e., basic tier and/or out-of-the-box solutions along with customized and/or higher tier options. If the vendor does not offer different pricing structures, please explain this in your proposal.

If there are separate licensing costs for CRM and Grants Management for Internal MassCEC users, please segment the costs across our suggested Phases, below.

**Further instructions**

1. Please use the table below as a template for your responses. The solutions and costs should be clear and easy to understand.
2. Where applicable, please include tiered pricing for Basic/standard package rates and customized and/or higher-tier rates.
3. Please also include the defined scope of work/services included with each cost.
4. Please also detail any other product capabilities and functions that may be of interest to MassCEC. Ensure these are linked clearly to the high-level goals of the project and describe their role in helping to achieve these goals.
5. Use attachments as necessary if more space is required.

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| --- | --- | --- |
| Category   | Vendor solution type   | Cost     |
|   |   | Phase 1: CRM  | Phase 2: Grant-Making  |
| Initial set up  |   | Phase 1a:   Phase 1b:    | Phase 2a:   Phase 2b:   |
| Licensing   |   | Phase 1a:   Phase 1b:   | Phase 2a:   Phase 2b:   |
| Staff training and support – implementation  |   | Phase 1a:   Phase 1b:   | Phase 2a:   Phase 2b:   |
| Staff training and support – post-implementation   |   | Phase 1a:   Phase 1b:  | Phase 2a:   Phase 2b:   |
| Integration with key systems  |   | Phase 1a:   Phase 1b:   | Phase 2a:   Phase 2b:   |
| Suggested optional features/add ons    |   | Phase 1a:   Phase 1b:   | Phase 2a:   Phase 2b:   |
| Maintenance cost (additional years – please include but do not put in the total anticipate cost)   |   |   |   |

**Section 7: Product and Service History**

1. What is the history of your interactive platforms? Please include the initial release date, current version number and development history.
2. Please provide a roadmap for the platform (this will be treated as confidential).

**Section 8. Product Upgrades and New Version Releases**

1. What is the process for new version release rollouts to the proposed CRM/database platform? To the proposed Grants Management platform?
2. What are the quality assurance/testing processes to follow in order to determine whether an upgrade or custom modification is suitable for release?
3. What is the process by which opportunities for system enhancements are identified, screened, programmed, field-tested, and released to customers?

**Section 9: Internal Training and Staff Support**

1. What type of training of MassCEC staff is required or recommended to support the implementation and continued support of a CRM/Database?
2. What type of training of MassCEC staff is required or recommended to support the implementation and continued support of a new Grants Management System?

Please keep in mind there will be different levels of staff use for a CRM/database OR Grants Management System.

**Section 10: Handoff – Skill Set Requirements of Personnel**

1. What are the skills and likely full-time equivalent (FTEs) need to implement and support the different phases of the project?
2. What are the skills and likely FTEs needed to maintain the platform at the end of integration?

**Section 11: Onboarding process for grantees (Grant-making portal only)**

1. What is the onboarding process for potential and awarded grantees to use a new Grants Management portal?

**Section 12: Intellectual property and Exit Strategy and data**

1. Who retains the rights to custom-developed code, configurations, and other IP created during the project?
2. In the unlikely event of project termination, how would the transition occur?

**Section 13: General comments**

1. Do you have any additional information to provide that would help MassCEC evaluate your submission?

**Section 14: Cover letter**

1. Please provide a cover letter, signed by an individual authorized to bind the proposed entity.

**Section 15: Primary Vendor Profile and Demographics**

1. Provide a statement giving a brief history of your company.
2. How is your company organized? (Feel free to provide an organization chart).
3. Describe the team structure that will work on this project.
4. What are the certifications held by team members?

**Please make sure to also include:**

* The company’s official name and address.
* What type of entity it is (corporation or partnership, etc).
* The name, address, and telephone number of the person who receives correspondence and who is authorized to make decisions or represent the vendor. Please state his or her capacity within the company.
* The total number of years the vendor has been in business and offering end user facing applications. If applicable, state the number of years the vendor has been operating under the present business name.
* A description of the primary implementation partner’s operations: facilities, business and objectives, and the number of employees