

Customer Relationship Management System

Invitation to Tender

Prepared by Bath Spa University

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1. **Introduction**
   1. Introduction to Bath Spa University (BSU)

BSU is a leading educational institution in creativity, culture and enterprise. Based on several campuses in and around the city of Bath, BSU attracts students from across the UK and, increasingly, from international markets.

The competitive HE environment has led many universities to improve the pace, professionalism and effectiveness of their contacts with applicants. BSU must exceed (or at least match) the efforts of comparator institutions in order to ensure that we remain competitive.

There are a significant number of well establish suppliers supporting mature CRM solutions. There are also a number who have adapted their product to cater specifically for the HE market. This includes bespoke interfaces to the Student Record system.

* 1. Scope of the project

There is currently no strategic adoption of CRM systems at BSU for the management of enquirer and applicant contacts. This puts the institution behind many of its competitors and is creating a significant manual overhead, particularly within UK domestic marketing teams.

In 2013, the BSU International Office implemented a stand-alone solution based on Salesforce. This has generally been seen to be successful and has made huge improvements to the day-to-day operation of that office. There are some gaps however with the current implementation of the product most notably the lack of integration with the Tribal SITS student records system. The UK Marketing Office were not in scope of this implementation however, and remain hampered with inefficient and manually intensive processes.

Resolving these issues is seen as being key to the delivery of the institution’s growth and internationalisation aspirations. Therefore, the Department of IT Services has undertaken an intensive business analysis exercise and has mapped processes across both International and UK operations to form the basis for the selection and deployment of a new CRM system.

There are a number of reasons that a new CRM system is required:

* The increasingly competitive nature of the home and overseas student recruitment market makes it more important than ever to provide applicants with demonstrably high service levels and a rapid and professional response.
* Conversion from enquirer to applicant, and applicant to enrolled student is critical and will be enhanced by CRM technology
* Current data management systems for student recruitment are manual and difficult to automate because the data is synchronised, not live.
* BSU needs a joined-up approach to communications with applicants across the University
* BSU needs robust management data to measure and evaluate the effectiveness of its marketing and communications activities at different stages of the student journey.
* BSU’s UK marketing team has no system to help manage data for mailshots – all communications with applicants are manually produced and tracked. With an increase in student numbers, the current process will become unworkable
* Loss of key members of staff for international marketing has identified gaps in the current knowledge of the team, and also with the current functionality of Salesforce.
* Support basic functionality with additional functionality around Business Intelligence and Social Media.
  1. Value of contract

Indicative price schedules for Higher Education CRM solutions have been obtained from three separate vendors. The indicative pricing shows we should be able to achieve our requirements with a solution with annual costs in the range of £24,000 to £35,000 per annum for a 3 year service agreement. Implementation costs have ranged from £5,000 to £21,000. All prices excluding VAT.

Details of current and forecast expenditure are given in good faith as a guide to past purchasing and current planning to assist you in submitting your response. They should not be interpreted as an undertaking to purchase any goods or services to any particular value and do not form part of the contract.

* 1. Contract term

BSU proposes to enter into one contract for a maximum period of 3 years with the successful tenderer. The anticipated implementation commencement date is October 2016.

* 1. Purpose and scope of this ITT

This ITT:

• Asks tenderers to submit their tenders in accordance with the instructions set out in the remainder of this ITT.

• Sets out the overall timetable and process for the procurement to tenderers.

• Provides tenderers with sufficient information to enable them to submit a compliant tender (including providing templates where relevant).

• Sets out the award criteria and the evaluation model that will be used to evaluate the tenders.

• Explains the administrative arrangements for the receipt of tenders.

1. **Procurement Information**

Bath Spa University would like to invite suppliers to tender for an integrated Marketing CRM solution.

Both Marketing and International Marketing have similar requirements pertaining to their key customers who are principally Course Inquirers, Course Applicants and Students’. Although typically these functions occur at an early stage of a customer’s relationship with the University, the CRM function will be required throughout the students’ association with BSU.

Configurable and automated methods of uploading data from the three sets of customers into the CRM is a key requirement. A full correspondence history between the customers and BSU is also required.

BSU would like to automatically schedule relevant correspondence with customers. This will involve putting together a library of correspondence (predominantly email) and automatically sending to customers with a given time delay between emails. Once establish, this process will require no user intervention.

BSU wishes to create bespoke emails, dynamically link to a list of recipients and store against their record. An understanding of the level of customer engagement is required by interaction with embedded links or other.

Flexible Events Management functionality is required allowing the scheduling, naming and coordinating of occasions to which Inquirers, Applicants and Students can be invited. After completion, the success of the Event must be assessed through various means including the level of Inquirer conversions into Applicants.

Sophisticated and flexible reporting mechanisms are required to present data is a meaningful way. Business Intelligence facilities are a key attribute to visually providing information from data to varied groups of key stakeholders.

You are invited to complete the Requirements section of this ITT (section 7) and submit it with your response.

1. **Tender Conditions and Contractual Requirements**

This section of the ITT sets out BSUs contracting requirements, general policy requirements, and the general tender conditions relating to this procurement process.

**Contracting requirements**

The contracting authority is BSU, which includes any subsidiary companies and other organisations that control or are controlled by BSU from time to time.

The appointed supplier will be expected to deliver the goods and/or provide services at BSU’s offices.

In the event that you have any concerns or queries in relation to the Contract, you should submit a clarification request through the e-tendering portal (InTend) in accordance with the provisions of this ITT by the Clarification Deadline (as defined below in the Timescales section of this ITT). Following such clarification requests, BSU may respond on the e-tendering portal and/or issue a clarification change to the Contract that will be sent to all potential suppliers submitting a tender response together with a copy of the original clarification request. You are advised not to rely on communications from BSU in respect of this ITT unless they are made in accordance with these instructions.

The draft contract that BSU proposes to use is included as Section 8, “Contract”. By submitting a response, you are agreeing to be bound by the terms of this ITT and the Contract without further negotiation or amendment. If the terms of the Contract render any tender response unworkable, you should submit a clarification in accordance with this ITT and BSU will consider whether any amendment to the Contract is required. Any amendments which are proposed but not approved by BSU through this process will not be acceptable and may be construed as a rejection, leading to a disqualification of the tender response.

BSU is under no obligation to consider any clarifications / amendments to the Contract proposed after the Clarification Deadline. Any proposed amendments that are received from a potential supplier as part of its tender response shall entitle BSU to reject that tender response and to disqualify that potential supplier from this Procurement Process.

**General Policy Requirements**

By submitting a tender response in response to this ITT, potential suppliers confirm that they will, and that they shall ensure that any consortium members and/or subcontractors will, comply with all applicable laws, codes of practice, statutory guidance and applicable BSU policies relevant to the goods and/or services being supplied.

**General tender conditions (“Tender Conditions”)**

Application of these Tender Conditions – In participating in this Procurement Process and/or by submitting a tender response it will be implied that you accept and will be bound by all the provisions of these Tender Conditions and this ITT. Accordingly, tender responses should be on the basis of and strictly in accordance with the requirements of this ITT.

Third party verifications – Your tender response is submitted on the basis that you consent to BSU carrying out all necessary actions to verify the information that you have provided, and the analysis of your tender response being undertaken by any one or more third parties commissioned by BSU for such purposes.

Information provided to potential suppliers – Information that is supplied to potential suppliers as part of this ITT and the supporting documents is supplied in good faith. The information contained in the ITT and the supporting documents and in any related written or oral communication is believed to be correct at the time of issue but BSU will not accept any liability for its accuracy, adequacy or completeness and no warranty is given as such.

Potential suppliers to make their own enquires – You are responsible for analysing and reviewing all information provided to you as part of this ITT and supporting documents and for forming your own opinions and seeking advice as you consider appropriate. You should notify BSU promptly of any perceived ambiguity, inconsistency or omission in this ITT and/or any in of its associated documents and/or in any information provided to you as part of this Procurement Process.

Amendments to the ITT – At any time prior to the Tender Response Deadline, BSU may amend the ITT including the Timescales. Any such amendment shall be issued to all potential suppliers as soon as reasonably practicable, and if appropriate to ensure potential suppliers have reasonable time in which to take such amendment into account, the Tender Response Deadline shall, at the discretion of BSU, be extended. Your tender response must comply with any amendment made by BSU in accordance with this paragraph or it may be rejected.

Compliance of tender response submission – Any goods and/or services offered should be on the basis of and strictly in accordance with the ITT (including, without limitation, any specification of BSU’s Requirements (as defined in section 7), these Tender Conditions and the Contract) and all other documents and any clarifications or updates issued by BSU as part of this Procurement Process.

Format of tender response submission – Tender responses must comprise the relevant documents specified by BSU completed in all areas and in the format as detailed. Any documents requested by BSU must be completed in full. It is, therefore, important that you read the ITT carefully before completing and submitting your tender response.

Modifications to tender response documents once submitted – You may modify your tender response prior to the Tender Response Deadline by giving written notice to BSU. Any modification should be clear and submitted as a complete new tender.

Rejection of tender responses or other documents – A tender response or any other document requested by BSU may be rejected which:

* contains gaps, omissions, misrepresentations, errors, uncompleted sections, or changes to the format of the tender documentation provided;
* contains hand written amendments which have not been initialled by the authorised signatory;
* does not reflect and confirm full and unconditional compliance with all of the documents issued by BSU forming part of the ITT;
* contains any caveats or any other statements or assumptions qualifying the tender response that are not capable of evaluation in accordance with the evaluation model or requiring changes to any documents issued by BSU in any way;
* is not submitted in a manner consistent with the provisions set out in this ITT;
* is received after the Tender Response Deadline.

Disqualification – If you breach these Tender Conditions, if there are any errors, omissions or material adverse changes relating to any information supplied by you at any stage in this Procurement Process, if any other circumstances set out in this ITT, and/or in any supporting documents, entitling BSU to reject a tender response apply and/or if you or your appointed advisers attempt:

* to inappropriately influence this Procurement Process;
* to fix or set the price for goods or services;
* to enter into an arrangement with any other party that such party shall refrain from submitting a tender response;
* to enter into any arrangement with any other party (other than another party that forms part of your consortium bid or is your proposed sub-contractor) as to the prices submitted;
* to collude in any other way;
* to engage in direct or indirect bribery or canvassing by you or your appointed advisers in relation to this Procurement Process; or
* to obtain information from any of the employees, agents or advisors of BSU concerning this Procurement Process (other than as set out in these Tender Conditions) or from another potential supplier or another tender response,

BSU shall be entitled to reject your tender response in full and to disqualify you from this Procurement Process. BSU shall have no liability to a disqualified potential supplier.

Conflicts of interest – You are responsible for ensuring that no conflicts of interest exist between you and your advisors and BSU and its advisors. If you fail to comply with this requirement, you may be disqualified from the Procurement Process at BSU’s discretion.

Tender costs – You are responsible for obtaining all information necessary for preparation of your tender response and for all costs and expenses incurred in preparation of the tender response. Subject to the “Liability” Tender Condition below, you accept by your participation in this procurement, including without limitation the submission of a tender response, that you will not be entitled to claim from BSU any costs, expenses or liabilities that you may incur in tendering for this procurement irrespective of whether or not your tender response is successful.

Rights to cancel or vary this Procurement Process - By issuing this ITT, entering into clarification communications with potential suppliers or by having any other form of communication with potential suppliers, BSU is not bound in any way to enter into any contractual or other arrangement with you or any other potential supplier. It is intended that the remainder of this Procurement Process will take place in accordance with the provisions of this ITT but BSU reserves the right to terminate, suspend, amend or vary (to include, without limitation, in relation to any timescales or deadlines) this Procurement Process by notice to all potential supplier in writing. Subject to the “Liability” Tender Condition below, BSU will have no liability for any losses, costs or expenses caused to you as a result of such termination, suspension, amendment or variation.

Consortium Members and sub-contractors – It is your responsibility to ensure that any staff, consortium members, sub-contractors and advisers abide by these Tender Conditions and the requirements of this ITT.

Liability – Nothing in these Tender Conditions is intended to exclude or limit the liability of BSU in relation to fraud or in other circumstances where the Customer Organisation’s liability may not be limited under any applicable law.

Warnings and disclaimers - While the information contained in this ITT is believed to be correct at the time of issue, neither BSU, its advisors, nor any other awarding authorities will accept any liability for its accuracy, adequacy or completeness, nor will any express or implied warranty be given. This exclusion extends to liability in relation to any statement, opinion or conclusion contained in or any omission from, this ITT (including any supporting documents) and in respect of any other written or oral communication transmitted (or otherwise made available) to any tenderer. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of BSU.

If you propose to enter into a Contract with BSU, you must rely on your own enquiries and on the terms and conditions set out in the Contract (as and when finally executed), subject to the limitations and restrictions specified in it.

Neither the issue of this ITT, nor any of the information presented in it, should be regarded as a commitment or representation on the part of BSU (or any other person) to enter into a contractual arrangement.

1. **Confidentiality and Information Governance**

All information supplied to you by BSU, including this ITT and all other documents relating to this Procurement Process, either in writing or orally, must be treated in confidence and not disclosed to any third party (save to your professional advisers, consortium members and/or sub-contractors strictly for the purposes only of helping you to participate in this Procurement Process and/or prepare your tender response) unless the information is already in the public domain or is required to be disclosed under any applicable laws.

You shall not disclose, copy or reproduce any of the information supplied to you as part of this Procurement Process other than for the purposes of preparing and submitting a tender response. There must be no publicity by you regarding the Procurement Process or the future award of any contract unless BSU has given express written consent to the relevant communication.

This ITT and its accompanying documents shall remain the property of BSU and must be returned on demand.

BSU reserves the right to disclose all documents relating to this Procurement Process, including without limitation your tender response, to any employee, third party agent, adviser or other third party involved in the procurement in support of, and/or in collaboration with BSU. BSU further reserves the right to publish the Contract once awarded and/or disclose information in connection with supplier performance under the Contract in accordance with any public sector transparency policies (as referred to below). By participating in this Procurement Process, you agree to such disclosure and/or publication by BSU in accordance with such rights reserved by it under this paragraph.

The Freedom of Information Act 2000 (“FOIA”), the Environmental Information Regulations 2004 (“EIR”), and public sector transparency policies, including the placing of contract award notices on the Contracts Finder database, apply to BSU (together the “**Disclosure Obligations**”).

You should be aware of BSU’s obligations and responsibilities under the Disclosure Obligations to disclose information held by BSU. Information provided by you in connection with this Procurement Process, or with any contract that may be awarded as a result of this exercise, may therefore have to be disclosed by BSU under the Disclosure Obligations, unless BSU decides that one of the statutory exemptions under the FOIA or the EIR applies.

If you wish to designate information supplied as part of your tender response or otherwise in connection with this tender exercise as confidential, you must provide clear and specific detail as to:

* the precise elements which are considered confidential and/or commercially sensitive;
* why you consider an exemption under the FOIA or EIR would apply; and
* the estimated length of time during which the exemption will apply.

The use of blanket protective markings of whole documents such as “commercial in confidence” will not be sufficient. By participating in this Procurement Process you agree that BSU should not and will not be bound by any such markings.

In addition, marking any material as “confidential” or “commercially sensitive” or equivalent should not be taken to mean that BSU accepts any duty of confidentiality by virtue of such marking. You accept that the decision as to which information will be disclosed is reserved to BSU, notwithstanding any consultation with you or any designation of information as confidential or commercially sensitive or equivalent you may have made. You agree, by participating further in this Procurement Process and/or submitting your tender response, that all information is provided to BSU on the basis that it may be disclosed under the Disclosure Obligations if BSU considers that it is required to do so and/or may be used by BSU in accordance with the provisions provision of this ITT.

Tender responses are also submitted on the condition that the appointed supplier will only process personal data (as may be defined under any relevant data protection laws) that it gains access to in performance of this Contract in accordance with BSU ’s instructions and will not use such personal data for any other purpose. The contracted supplier will undertake to process any personal data on BSU’s behalf in accordance with the relevant provisions of any relevant data protection laws and to ensure all consents required under such laws are obtained.

1. **Tender Validity**

Your tender response must remain open for acceptance by BSU for a period of sixty days from the Tender Response Deadline. A tender response not valid for this period may be rejected by BSU;

1. **Procurement Processes and Timescales**

* 1. Timescales

This procurement will follow a clear, structured and transparent process to ensure a fair and level playing field is maintained at all times, and that all those submitting a response are treated equally.

The stages in the process for this project will be:

|  |  |  |
| --- | --- | --- |
| **Activity Number** | **Activity** | **Date and Time** |
| 1 | Tender published by Bath Spa University | 11/7/2016 |
| 2 | Deadline for clarification questions (“Clarification Deadline”) | 12:00pm 22/7/2016 |
| 3 | Deadline for BSU to respond to clarification questions | 12:00pm 29/7/2016 |
| 4 | **Tender Response Deadline** | 12:00pm 8/8/2016 |
| 5 | Evaluation and shortlisting by BSU panel completion | 5:00pm 19/8/2016 |
| 6 | Scenario based demonstrations completion | 5:00pm 16/9/2016 |
| 7 | Preferred Supplier informed | 5:00pm 23/9/2016 |
| 8 | Contract negotiation and finalisation | 5:00pm 30/9/2016 |

You must submit your completed document and any relevant information by 12:00 noon on the Tender Response Deadline.

* 1. Instructions for Responding

The following requirements should be complied with when summiting your response to this ITT:

* Your submission must be compliant with this ITT (in particular sections 3 and 5) and submitted within the specified Timescales (section 6.1).
* Your submission must be uploaded to InTend before 12noon on the Tender Response Deadline.
* Your submission must be signed by a duly authorised representative.
* Your submission must meet stated minimum requirements and not be dependent upon any other bid or any other factors external to the submission, this ITT or the Procurement Process itself. Your response must be capable of being accepted by BSU in its own right.
* Please ensure that information provided as part of its response is of sufficient quality and detail that an informed assessment of it can be made by BSU.
* All attachments/supporting documentation should be provided separately to your main tender response and clearly labelled to make it clear as to which part of your tender response it relates.
* If you submit a generic policy / document, you must indicate the page and paragraph reference that is relevant to a particular part of your tender response.
* Where supporting evidence is requested as ‘or equivalent’ – you must demonstrate such equivalence as part of your tender response.
* Any deliberate alteration of a BSU requirement as part of your tender response will invalidate your tender response to that requirement and for evaluation purposes you shall be deemed not to have responded to that particular requirement.
* Responses should be concise, unambiguous, and should directly address the Requirements stated in this ITT (section 7 in particular). BSU reserves the right to mark submissions down or exclude them if they contain ambiguities, caveats or lack clarity.
* Your tender responses to the tender requirements and pricing will be incorporated into the Contract, as appropriate.

Your submission should include:

* Completed Requirements Document (section 7)
* Any additional relevant information you wish to provide. As part of this, PDF, JPG, PPT, Word and Excel formats can be used for any additional supporting documentation (other formats should not be used without the prior written approval of BSU).
  1. Clarification Requests
* All clarification requests should be submitted by the Clarification Deadline, as set out in the Timescales section of this ITT. BSU is under no obligation to respond to clarification requests received after the Clarification Deadline.
* Any clarification requests should clearly reference the appropriate paragraph in the ITT documentation and, to the extent possible, should be aggregated rather than sent individually.
* BSU reserves the right to issue any clarification request made by you, and the response, to all potential suppliers unless you expressly require it to be kept confidential at the time the request is made. If BSU considers the contents of the request not to be confidential, it will inform you and you will have the opportunity to withdraw the clarification query prior to BSU responding to all potential suppliers.
* BSU may at any time request further information from potential suppliers to verify or clarify any aspects of their tender response or other information they may have provided. Should you not provide supplementary information or clarifications to BSU by any deadline notified to you, your tender response may be rejected in full and you may be disqualified from this Procurement Process.
  1. Evaluation Criteria

You will have your tender response evaluated as set out below:

**Stage 1:** Tender responses will be checked to ensure that they have been completed correctly in accordance with this ITT and all necessary information has been provided. Tender responses correctly completed with all relevant information being provided will proceed to Stage 2. Any tender responses not correctly completed in accordance with the requirements of this ITT and/or containing omissions may be rejected at this point. Where a tender response is rejected at this point it will automatically be disqualified and will not be further evaluated.

**Stage 2:** If a bidder succeeds in passing Stage 1 of the evaluation, then it will have its detailed tender response to BSU’s requirements evaluated in accordance with the evaluation methodology set out below. At this stage, Functional Requirement and Further Details Questions will be considered together with the overall price which includes Implementation Cost and Annual Cost. The relevant weightings of importance for Stage 2 are:

|  |  |
| --- | --- |
| **Criteria** | **Weighting** |
| Functional Requirement and Further Details Questions | 50% |
| Implementation Cost | 20% |
| Annual Cost | 30% |

Functional Requirements and Further Questions Evaluation - The Functional Requirements described in section 7.1 and the Further Details Questions described in section 7.2 of this document will be evaluated and scored relative to the criteria described below: -

|  |  |
| --- | --- |
| **Points** | **Interpretation** |
| **10** | **Outstanding –** Overall the response demonstrates that the bidder exceeds all areas of the requirement and potentially provides functional opportunities beyond those originally specified by BSU. |
| **9** | **Excellent** –Overall the response demonstrates that the bidder meets or all areas of the requirement and provides all of the areas evidence requested in the level of detail requested. |
| **7** | **Good** - Overall the response demonstrates that the bidder meets all areas of the requirement and provides all of the areas of evidence requested, but contains some trivial omissions in relation to the level of detail requested in terms of either the response or the evidence. This, therefore, is a good response that meets all aspects of the requirement with only a trivial level of omission. |
| **5** | **Adequate** - Overall the response demonstrates that the bidder meets all areas of the requirement, but not all of the areas of evidence requested have been provided. This, therefore, is an adequate response, but with some limited omission creating doubt as to whether the bidder can meet the requirement due to the bidder’s failure to provide all of the evidence requested. |
| **3** | **Poor** – The response does not demonstrate that the bidder meets the requirement in one or more areas. This, therefore, is a poor response with significant failure to demonstrate whether the bidder can meet the requirement due to the failure by the bidder to show that it meets one or more areas of the requirement. |
| **0** | **Unacceptable** - The response is non-compliant with the requirements of the ITT and/or no response has been provided. |

Implementation Cost Evaluation - A maximum offer score of 10 will be awarded to the tender response offering the lowest Implementation Cost. Other tender responses will be awarded a mark by application of the following formula: (lowest Implementation Cost /Implementation Cost being evaluated) x 10 (rounded to two decimal places) = Implementation Cost score.

Annual Cost Evaluation - A maximum offer score of 10 will be awarded to the tender response offering the lowest Annual Cost. Other tender responses will be awarded a mark by application of the following formula: (lowest Annual Cost /Annual Cost being evaluated) x 10 (rounded to two decimal places) = Annual Cost score.

Taking into consideration the relevant weightings described above, the 3 highest scoring tenders will be invited to BSU to undertake Scenario Based Demonstrations. This will be **Stage 3** of the evaluation process.

**Stage 3:** The included document “Marketing and International Marketing CRM Scenario Based Demonstrations” describes the requirements and scoring criteria for this phase. The final score will be based on both stage 2 and stage 3 of the evaluation process with the following stage weightings:

|  |  |
| --- | --- |
| **Stage** | **Weighting** |
| Stage 2 | 60% |
| Stage 3 | 40% |

Moderation and application of weightings – The evaluation panel appointed for this procurement will meet to agree and moderate scores for each award criteria. Final overall tender score will be obtained by applying the relevant weighting factors set out as part of the award criteria tables above. The winning tender response shall be the tender response achieving the highest overall score when applying the above evaluation methodology.

If after stage 2 is completed, the score differential between competing tenders is so great that after including potential full marks as a result of stage 3, it would be impossible for the tendering candidate to outscore the leading candidate from Stage 2, BSU reserves the right to exclude the tender in question from Stage 3.

If at the end of Stage 2, identical scores are achieved by competing tenders, BSU reserves the right to either increase of decrease the number of competitors invited to take part in the Stage 3 demonstrations.

If at the end of Stage 3 and after final evaluation has taken place, two or more competing organisations are found to have achieve identical final scores, BSU reserves the right to seek further clarification from competing tendering organisations concerning areas of possible contention which may have ramification for overall final score.

Example: -

Stage 1. Company A delivers a tender to BSU before the Tender Response Deadline. The tender is found to have been completed correctly in accordance with this ITT and all necessary information has been provided. The tender progresses to Stage 2 of the process.

Stage 2. Company A is assessed on their answers to the Functional Requirements and Further Details Questions. The highest possible score for this section is 620 points. Given that a relevant weighting of 50% has been allocated to this section, if Company A received 620 points for this section then a weighting of 50% for Functional Requirements and Further Details Questions would be allocated. However, Company A received a score of 310 points. This therefore contributes 25% to the final value. Calculated by: -

(310/620) \* 50 = 25%

Company A is assessed on their Implementation Cost. Implementation Cost has a relevant weighting of 20% of the final figure. The Implementation Cost is calculated relative to the cheapest Implementation Cost of any tender submitted and can receive a maximum points score of 10. Company B is the cheapest and so they will receive the maximum score and consequently 20% for this criteria. Company B submits an Implementation Cost of £20,000 so £20,000 is taken as the benchmark. Company A submits an Implementation Cost of £25,000. Their Implementation Cost weighted contribution is calculated by: -

(20,000/25,000) \* 10 = 8 so Company A score 8 out of 10 for Implementation Cost. As the weighted percentage for Implementation Cost is 20% of the overall figure, the percent value for Company A is calculated by: -

(8/10) \*20 = 16%

Company A is assessed on their Annual Cost. Annual Cost has a relevant weighting of 30% of the final figure. The Annual Cost is calculated relative to the cheapest Annual Cost of any tender submitted and can receive a maximum points score of 10. Company C is the cheapest and so they will receive the maximum score and consequently 30% for this criteria. Company C submits an Annual Cost of £30,000 so £30,000 is taken as the benchmark. Company A submits an Annual Cost of £40,000. Their Annual Cost weighted contribution is calculated by: -

(30,000/40,000) \* 10 = 7.5 so Company A score 7.5 out of 10 for Annual Cost. As the weighted percentage for Annual Cost is 30% of the overall figure, the percent value for Company A is calculated by: -

(7.5/10) \*30 = 22.5%

|  |  |  |
| --- | --- | --- |
| **Criteria** | **Weighting** | **Weighted % for Company A** |
| Functional Requirement and Further Details Questions | 50% | 25% |
| Implementation Cost | 20% | 16% |
| Annual Cost | 30% | 22.5% |

The overall percent score for stage 2 is calculate as: -

25% + 16% + 22.5% = 63.5%

The table above summarises the weighted contributions for Company A. To give an overall percent value for stage 2 for Company A, they are added up to give 63.5%. If this % value is in the top 3 for all tendering companies, Company A will be invited to stage 3 – demonstration.

Stage 3. This stage considers the success of the demonstration stage and then considers this together with the percentage value brought forward from stage 2 in a ratio of 60% for stage 2 and 40% for stage 3. The total possible score for the demonstration stage is 100. Company A scores 70 for this stage. The weighted % contribution for Company A for stage 3 is therefore calculated as: -

(70/100) \* 40 = 28%

A 60% weighted contribution for stage 2 gives an overall weighted % contribution for Company A for this stage of: -

(63.5/100) \*60 = 38.1%

|  |  |  |
| --- | --- | --- |
| **Stage** | **Weighting** | **Weighted % for Company A** |
| Stage 2 | 60% | 38.1% |
| Stage 3 | 40% | 28% |

The overall percent score for the tender submitted by Company A is therefore: -

38.1% + 28% = 66.1%

* 1. Collusion and Inducements

Any collusion with other potential suppliers will invalidate your tender. By submitting a tender, you declare that it is a bona fide tender, intended to be competitive and that you have not fixed or adjusted the amount of the tender by or in accordance with any agreement or arrangement with any other party.

Offering an inducement of any kind in relation to obtaining this or any other contract with Bath Spa University will disqualify your tender from being considered and may constitute a criminal offence.

* 1. Notification of award

All those submitting tender responses to this ITT will be informed when the contract is awarded. BSU will inform all unsuccessful responders of the identity and relative advantages and characteristics of the successful tenderer as compared with their response.

1. **Requirements – assessment questions for completion**

Please indicate whether an item is:

* Standard – comes as standard functionality, minimal configuration may be required but no bespoke development.
* Bespoke – does not come as standard and will require bespoke customisation to achieve the requirement.
* Not available – not currently provided as either standard or customisable option.

Please then enter some brief details of how your system can satisfy the requirements.

The document utilises the MoSCoW prioritisation method:

* **M** - **MUST** have this or the system will not work.
* **S** - **SHOULD** have this if at all possible, but the system will work without.
* **C** - **COULD** have this if it does not affect anything else, if there is time
* **W** - **WON'T** have this time but **WOULD** like in the future. Requirements for the future

Please pay particular attention to the **M**ust have requirements.

Some sections invite you to provide an overview of any other key features/functionalities of your product which are not covered in free format text boxes. Please consider these to be an important part of the selection criteria.

* 1. Detailed Functional Requirements

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| **Item** | **High Level Requirement** | **MoSCoW Importance** | **Standard, Bespoke or Not Available** | **Supplier Comment** | **Points**  **(For BSU use)** |
| 1 | A centralised database is required into which Inquirers are recorded, from which correspondence is sent and in which, correspondence history is retained. Note. An Inquirer is someone who has expressed an interest in joining the University but has not yet submitted an application. | M |  |  |  |
| 2 | Provide a user interface to enter Inquirer information directly into the database rather than uploading via other means. | M |  |  |  |
| 3 | Automatic upload of UCAS bar scanned Inquirer data. UCAS provide a database of Inquirer information received at UCAS organised events. An automated upload to the CRM database is required. | M |  |  |  |
| 4 | Enter Inquirer information directly into an iPad app which will automatically upload to the central database. | M |  |  |  |
| 5 | Enable the direct entry of Inquirer data from designated third-party systems. Inquires can express an interest in BSU or express an interest in BSU courses via third party websites. A requirement is to automatically upload this data into the CRM. | M |  |  |  |
| 6 | Enable the input of Inquirer data via a spreadsheet. At times, Inquirer information may be entered directly into a formatted spreadsheet. An automated process must be created to copy this data directly into the CRM. | M |  |  |  |
| 7 | Collect Inquirer data via the BSU website to automatically update the main CRM database. | M |  |  |  |
| 8 | Setup generic emails to be scheduled for sending to Inquirers once they have expressed an interest in attending BSU. | M |  |  |  |
| 9 | Setup generic emails to be scheduled for sending to Inquirers with the ability to be linked to specific subject inquiries. For example, if an inquirer has expressed an interest in a specific course, enable the generic email to dynamically by inserted with specific course related material. | M |  |  |  |
| 10 | Setup an automated schedule of email correspondence. Once the schedule of email correspondence with dynamic content is designed and set, it should require no further user intervention until the content requires amending. | M |  |  |  |
| 11 | Inquirer Journey. Store the fact that an email has been sent against the Inquirer record. Ensure that the full history of correspondence is stored against the Inquirer record. | M |  |  |  |
| 12 | Be able to identify the level of user engagement with each email and all other means of communication sent. For example, understand which inquirers have opened their email, which have engaged with any links contained within. | M |  |  |  |
| 13 | Produce reports of user engagement. For example, an Inquirer email containing url links, produce a report showing those Inquirers who have accessed all three links. | M |  |  |  |
| 14 | To produce management information on the Inquirer engagement statistics. An example of this management information would be to assist staff in assessing which Inquirers are most likely to submit an application to the University. | M |  |  |  |
| 15 | Include a data archive/delete facility. For records of no further interest to the University, provide an archive or delete facility. | M |  |  |  |
| 16 | Write and store bespoke emails against the Inquirer record. For example as well as engaging with Inquirers with standard emails via a pre designed, scheduled task, ensure that bespoke emails can be written and sent to individual Inquires and stored against their record. | M |  |  |  |
| 17 | Write bespoke emails. Send to a number of recipients and store against their record. | M |  |  |  |
| 18 | An automated process for inserting or updating SITS Applicant data into the CRM. SITS is the student record system containing the Applicant and Student data. There must be an automated process for copying Applicant data from SITS into the CRM. | M |  |  |  |
| 19 | Require the ability to segment SITS data within CRM. An example being, the CRM must be able to differentiate between an Applicant copied in from SITS wishing to apply for 2016/17 entry and an Applicant wishing to apply for 2017/18 entry. | M |  |  |  |
| 20 | The insertion of SITS data should include attributes required to identify the appropriate characteristics of WP applicants. For example, the CRM must be flexible enough to contain user defined fields such as an indicator to show whether the Applicant has taken an Access course. | S |  |  |  |
| 21 | Flexible reporting depending upon Applicant attribute and/or communication stage. An example would be to allow the user to fully define which Applicant attributes form part of any given report. | M |  |  |  |
| 22 | Setup generic emails to be scheduled for sending to Applicants. In a similar to Inquirers, create a library of generic emails for sending to Applicants. | M |  |  |  |
| 23 | Setup an automated schedule of email correspondence for Applicants. For example, there may be 5 generic Applicant emails. Automatically schedule each email to be sent with a 1 week gap. Ensure the emails can contain dynamic content, for example refer to the Applicant by name rather than “Dear Applicant…”. Ensure that the email can contain specific information pertaining to the course to which the Applicant is applying. | M |  |  |  |
| 24 | Store the fact that an email has been sent against the Applicant record. Ensure that a full history of correspondence is retained. | M |  |  |  |
|  | Be able to identify the level of Applicant engagement of each email sent. To understand more about our Applicant customers, it is important to glean information from how an Applicant interacts with their correspondence whether through accessing imbedded url links or other. | M |  |  |  |
| 25 | Produce reports of user Applicant engagement. Provide a flexible reporting mechanism by which the level of Applicant engagement can be presented to stakeholders. | M |  |  |  |
| 26 | Select a number of recipients and associate and send the generic email. An example would be to access a particular email from the generic email library, dynamically select a list of Applicants who have expressed an interest in a particular course and send them the email. | M |  |  |  |
| 27 | Record a “Task” which is the fact that a telephone conversation has taken place with an Applicant. | M |  |  |  |
| 28 | Allow an Inquirer/Applicant/Student to opt out of receiving SMS text messages. | M |  |  |  |
| 29 | Allow an Inquirer/Applicant/Student to opt out of receiving communication via social media. | M |  |  |  |
| 30 | Build and retain a CRM relationship with other non-Inquirer/Applicant/Student entities such as schools. | M |  |  |  |
| 31 | Flexible licencing model. For example, upon agreement, enable system access to be expanded to further staff/departments. Depending upon role, allow system functionality to be specifically configured. For example, one member of staff may require to see all CRM Applicant correspondence but in browse only mode. | M |  |  |  |
| 32 | Customisable email creation. For example, enable a bespoke email to be designed for one off use. Dynamically select the list of recipients, send and record. | M |  |  |  |
| 33 | Assess the success of campaigns both individually and comparatively. A campaign may take the form or an email, telephone or webinar correspondence. The campaign will be directed towards a group of dynamically selected Inquirers, Applicants or Students. The Inquirers, Applicants or Students participation in the campaign will be stored against their record. The system needs to be able to assess the success of a campaign from both the perspective of an individual campaign ( for example, has running the campaign increased the number of Inquirers converting to Applicants) and by comparing the success of one campaign to the success or another. | M |  |  |  |
| 34 | Generate letters to address to definable recipients on an either bespoke basis or from a library of predefined letters. Record the letter against the Applicant record. | M |  |  |  |
| 35 | Events Management System. The system must facilitate the creation of Events. An Event must have a name, a start and end date and it must be possible to dynamically associate Inquirers, Applicants or Students to an Event. It must be possible to record attendance to an Event against the Inquirers, Applicants or Students record. | M |  |  |  |
| 36 | An Inquirer/Applicant Portal. | S |  |  |  |
| 37 | Custom form building and delivery. For example, to design a bespoke form to collect correspondence information from Inquirers and to send to Inquirers who have expressed an interest in a particular course. | C |  |  |  |
| 38 | The ability to link together entities. For example, a CRM relationship is retained with both Applicants and Schools. Link together the Applicant and the School. An example could be by looking at an Applicants record, be able to see all of the correspondence sent to the school to which the Applicant attended. | S |  |  |  |
| 39 | To store, mobile contact numbers, dynamically select groups of Inquirers/Applicants/Students, write and send an SMS text message and record the message against the Inquirer/Applicant/Student record. | S |  |  |  |
| 40 | Student Record system integration. Strong links between the CRM and the University SITS student record are required particularly related to the seamless transferring of data. | S |  |  |  |
| 41 | Course Inquiry analytical information. For example, BSU Events are setup to encourage prospective Applicants to join the University. At the Event, prospective Applicants may express an interest in a course not current run by BSU. It would be very useful to record this information. | S |  |  |  |
| 42 | Enable appropriate communication via social media (examples Facebook and twitter). Record the history of any social media interaction against the Inquirer/Applicant/Student record. | S |  |  |  |
| 43 | To be able to see the complete student (Inquirer, Applicant, Student, Alumni) communication history stored in one place. | S |  |  |  |
| 44 | Adaptive and flexible Business Intelligence and dash boarding facilities to graphically display information and meaning from data present within the CRM. | M |  |  |  |
| 45 | Self-sufficiency in terms of user application development and configuration. As far as possible, enable expert users to perform system configuration without the need of consultant or IT assistance. | S |  |  |  |
| 46 | Mobile Device compatibility. Enable reports and dashboards to be presents via mobile devices. | S |  |  |  |
| 47 | Social Media monitoring. Enable the system to assess the success of BSU Events or other by monitoring correspondence taking place on social media. | S |  |  |  |
| 48 | Portfolio Management. Enable CRM data and management information to contribute positively to the creation of quality and marketable courses in the future. | S |  |  |  |
| 49 | For a CRM to positively contribute to the ability to track a student throughout their University journey from beginning to end. | S |  |  |  |
| 50 | Sophisticated and flexible data interfaces to third party systems. | M |  |  |  |
| 51 | The CRM is required to add to and improve student analytics. An example would be to use CRM data and interaction understanding to have a greater understanding of those students who have a higher vulnerability of withdrawing from the University. | S |  |  |  |
| 52 | As a contributor to the user experience, the CRM solution must accommodate single sign on via Shibboleth, SAML2 or other. | S |  |  |  |

* 1. Further Details Questions

Please provide details of an example Project Plan for implementation of your solution including timescales, installation, build, training etc.

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Score (BSU Use)

Please describe your approach and experience of the migration/import of data from our current Salesforce platform.

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Score (BSU Use)

Please outline your approach to the implementation of a new system – for example, assisted build, guided implementation etc.

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Score (BSU Use)

Please describe the User Groups offered which you engage. What level of engagement does the user group receive from you?

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Score (BSU Use)

Please describe your support arrangements for the system as a whole (technical and functional). Please include details of: Your helpdesk offering, call logging procedure, routes to resolve difficult issues within a reasonable timeframe, SLAs.

Please also describe the structure of the support function, support staff to customer ratios, escalation processes. What remote access do you prefer for support to dial into system – if in house?

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Score (BSU Use)

What data integrity testing is done?

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Score (BSU Use)

What upgrades are offered and when? Are upgrades mandatory? Who is responsible for these upgrades? What upgrade support options could you offer either hosted or in house?

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Score (BSU Use)

How many database instances do you do as a standard?

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Score (BSU Use)

What user documentation and training is available?

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Score (BSU Use)

Please provide a recent copy and details of your product roadmap.

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Score (BSU Use)

Please provide details of 3 reference sites which use your system. Ideally these will be in the Higher Education Sector.

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Score (BSU Use)

* 1. Costs

Please provide a detailed breakdown of costs for both implementation and annual costs. This should include all costs to provide the solution in a go live state including Software, Implementation, Training of system administrators, Training of Marketing staff, any bespoke work costs

not detailed elsewhere, Annual Maintenance and support costs. Include any details of annual cost reviews. Include consultancy cost which comes as standard within the overall final figure. Explicitly stipulate any essential maintenance cost within the section below. Include the detail of any additional cost (such as further consultancy or services) which we may choose to incur but which will not form part of the overall final figure.

If you offer hosted and onsite options, please provide costs for both. In the case of a hosted solution you should include figures for

upgrades and maintenance – plus details of connections/internet/fixed line. All costs should be submitted in pounds sterling.

Please provide a total figure for all implementation costs payable by BSU (“Implementation Costs”).

Please provide a total figure for all annual costs payable by BSU (“Annual Costs”).

Implementation Costs Score (BSU Use)

Annual Costs Score (BSU Use)

1. **Contract**

Please see document “Applicant CRM Contract” included as part of this document set.