

**2024 Higher Education Recruitment**

**Customer Relationship Management Solution**

 REQUEST FOR PROPOSAL

King’s University College

266 Epworth Ave

London, ON

N6A 2M3

**INSTRUCTIONS TO BIDDERS**

1. **Summary**

This document requests bids for Higher Education Recruitment Customer Relationship Management (CRM) Solution at King’s University College (hereby referred to as “King’s”).

The CRM Selection Committee (hereby referred to as “the Committee”) will be made up of King’s administrators and operational staff with responsibilities related to this area.

1. **Bid Submissions**

King’s is committed to equity and diversity and encourages applications from all qualified Bidders including women, members of visible minorities, aboriginal persons and persons with disabilities.

To receive consideration, bids must be submitted in accordance with the following instructions. Failure to comply with these instructions will result in the bid being disqualified.

The Request for Proposal Form and Schedule B (Bidder References) must be included in the bid submission. There shall be no alteration of or changes made to the Form or Schedule. Any alterations made to the Form or Schedule, other than the supply of the required information, may result in the bid being declared non-compliant and rejected without further consideration.

All bids must be emailed by the date/time outlined in Schedule A to Tiffany Chisholm, Purchasing Services Coordinator at tiffany.chisholm@kings.uwo.ca with a subject line containing "Higher Education Recruitment CRM RFP" and the name of the Bidder.

King’s is not responsible for the timeliness of documents emailed nor will King’s accept any bid emailed to an email address other than the specified email address above. King’s is neither liable nor responsible for any costs incurred by a Bidder in the preparation, submission, or presentation of their bid to this RFP.

Bidders are advised that it is not permissible to send a copy(s) of a response to any employee, consultant, agent, volunteer or business employed or working on behalf of King’s or involved in this process, and King’s will reject without further consideration any response so delivered.

All documents related to the bid become the property of King’s. All information, data, recommendations and reports resulting from the project become the property of King’s.

1. **Inquiries**

Bidders having any questions or requiring clarification of the intent or meaning of any part thereof shall notify Tiffany Chisholm by email (tiffany.chisholm@kings.uwo.ca) by the deadline for submission of questions as outlined in Schedule A.

1. **Communication of all RFP documents**

The original RFP document will be posted on Biddingo and the King’s website.

If it becomes necessary to revise any part of this RFP, addenda and amendments will be posted solely on the King’s website <https://www.kings.uwo.ca/about-kings/facts-and-information/administrative-departments/finance/rfp/>.

For RFP’s valued $100,000 or more, the award notice will be posted solely on Biddingo.

It is the sole responsibility of each potential bidder to check the King’s website for any/all changes to the original RFP document, as these will become part of the RFP specifications.

1. **Assessment of Response**

All bids will be opened in private. The Committee will evaluate the bids based on the pre-determined evaluation criteria outlined in Attachment 1.

As the Committee evaluates the bids, decisions will be based on the contents of the bid as submitted. Each Bidder shall include any and all information required as outlined in Attachment 2. It shall be explicitly understood that there shall be no opportunity to make any material change to the bid, including any alteration, addition or deletion of any element within the bid as submitted based on dates outlined in Schedule A. Information submitted independent of the response document or after closing will not be considered by the Committee.

King’s may seek clarifications from a Bidder after the closing date. Clarification questions will be submitted to the Bidder in writing. Answers to the written clarification questions must be returned to King’s in writing. The intent of the clarification is simply to obtain further explanation and understanding of what was intended by the Bidder. A clarification shall not provide an opportunity to make any material changes to the original bid, including any alteration, addition or deletion of any element of the original bid.

1. **Bid Acceptance/Rejection**

No action by King’s or the Committee implied or otherwise, shall be construed as acceptance to this RFP.

King’s reserves the right to accept any bid (in whole, or a portion thereof) which may be deemed to be most advantageous to King’s, or to reject any or all bids. Although King’s would like to award this contract to one Bidder, it realizes that it may not be in King’s best interest to do so. Bidders shall highlight in the bid any cost or operational advantages of awarding all service requests to one Bidder.

King’s may declare, at its sole and unfettered discretion, any bid to be non-compliant, and reject without further consideration if it:

* is informal, incomplete, unqualified, or otherwise irregular in any way;
* is not legible, is not dated, is not executed in the legal registered name of the entity, is not signed by authorized officials, and/or does not acknowledge all addenda that may have been issued;
* is submitted without the required materials (eg. Request for Proposal Form);
* is submitted without first having attended a mandatory site visit (if applicable);
* does not provide the information called for in the RFP documents as outlined in Attachment 2;
* does not contain sufficient information for the Committee to evaluate the Bid based on the evaluation criteria contained in Attachment 1.

King’s, at its sole and unfettered discretion, may reject without further consideration any response where the Bidder, a member of the Bidder's team, an employee, shareholder, director, officer, partner or person otherwise associated with the Bidder:

* has now or has in the past, unsatisfactorily performed work for King’s or had an unsatisfactory relationship with King’s, by contract or otherwise, in the sole opinion of King’s;
* has a contract with King’s which in the sole opinion of King’s, is not in good standing or has had a contract terminated by King’s for non-performance;
* is engaged in a substantially unresolved dispute or is in litigation with King’s or has a claim or judgment arising from litigation;
* has been charged or convicted of an offence with regard to a business enterprise which has or may have an impact upon King’s;
* is considered to have a conflict of interest, in the sole opinion of King’s.
1. **Invoicing and Payment**

King’s standard payment policy is net 30 days following receipt of invoice and sign-off by the responsible department or faculty. Final payment terms will be negotiated between the successful Bidder (if any), and King’s prior to contract signing.

1. **Debriefing (applies to RFP valued $100,000 or more)**

The successful Bidder(s) will be notified of their success according to the Notification to Successful Bidder timeline in Schedule A. After this date, and within sixty (60) days, Bidders may request a debriefing, in writing, by emailing Tiffany Chisholm at tiffany.chisholm@kings.uwo.ca. The intent of the debriefing information session is to aid the Bidder in presenting a better proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

1. **Confidentiality**

The successful Bidder (and employees) may be required to sign an agreement of confidentiality with regard to information that is proprietary to King’s.

1. **Accessibility**

King’s is committed to recognizing the dignity and independence of all and seeks to ensure that persons with disabilities have genuine, open and unhindered access to the College’s RFP opportunities. If you require an accommodation during the RFP process, please contact Tiffany Chisholm at tiffany.chisholm@kings.uwo.ca or 519-433-3491 for assistance.

As outlined in the Ontario Regulation 429-07, Accessibility for Ontarians with Disability Act, 2005, King’s will incorporate accessibility criteria and features when procuring, goods, services and facilities, except where it is not practical to do so.

The Bidder will respect the dignity and independence of persons with disabilities in accordance with the Accessibility Standards for Integrated Accessibility Standards O. Reg. 191/11, s. 5 (1); O. Reg. 413/12, s. 4 (1) developed under the Accessibility for Ontarians with Disabilities Act, 2005.

*End of Instructions to Bidders*

**REQUEST FOR PROPOSAL FORM**

|  |
| --- |
| **Bidder Identity** |
| Full Legal Registered Name |  |
| Any Other Relevant Name |  |
| Year Established |  |
| Head Office Address |  |
| Phone Number |  |
| Type of Entity | \_\_ Corporation\_\_ Unregistered Partnership\_\_ Registered Partnership\_\_ Proprietorship\_\_ Registered Joint Venture\_\_ Unregistered Joint Venture\_\_ Other. Explain: |
| Number of Employees |  |

We the undersigned, having examined the Higher Education Recruitment CRM RFP documents (including any and all addenda and amendments), and are satisfied that we understand the services as identified. We further acknowledge that we have not relied on the completeness of such information and declare ourselves competent to undertake and complete the services and do hereby irrevocably propose and agree to carry out the services outlined in Attachment 2. We hereby certify that we have no conflict of interest in submitting this bid. We acknowledge that the below has been included as part of this bid:

* + Request for Proposal Form
	+ Schedule B – Bidder References
	+ Schedule C – Rate Bid Form
	+ Any and all addenda and amendments

We hereby certify that we have no conflict of interest in submitting this bid. For the purposes of this section, the term “Conflict of Interest” means in relation to the RFP process, the Bidder has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to:

1. having or having access to confidential information of King’s in the preparation of its proposal that is not available to other Bidders;
2. communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process); or
3. engaging in conduct that compromises or could be seen to compromise the integrity of the RFP process.

If the below box is left blank, the Bidder will be deemed to declare that:

(1) there was no Conflict of Interest in preparing its proposal and

(2) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

Otherwise, if the statement below applies, check the box.

* The Bidder declares that there is an actual or potential Conflict of Interest relating to the preparation of its proposal and/or the Bidder foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP

If the Bidder declares an actual or potential Conflict of Interest by marking the box above, the Bidder must set out below details of the actual or potential Conflict of Interest:

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| --- |
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|  |

The undersigned hereby represents and warrants as to having authority to execute the document on behalf of the Bidder.

Name of Authorized Officer(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Executed this \_\_\_\_ day of \_\_\_\_\_\_\_ , 2024.

**This form MUST be signed and dated to be considered a valid bid.**

*End of Request For Proposal Form*

**SCHEDULE A – TARGET DATES**

King’s has identified the following project target dates:

|  |  |
| --- | --- |
| **Activity** | **Target Date** |
| RFP Issued | Wednesday, February 7th, 2024 |
| Deadline for Questions/Clarifications on RFP | Wednesday, February 21st, 2024 |
| Deadline for Answers/Clarifications on RFP | Friday, February 28th, 2024 |
| Closing Date:  RFP Submissions Due | Friday, March 15th, 2024 |
| RFP Review Period | March 18th-27th,2024 |
| Notification of Short Listed Bidders | Thursday, March 28th, 2024 |
| Presentations/Interviews of Short Listed Bidders | April 1st – 5th, 2024 |
| Committee Deliberations | April 8th-12th, 2024 |
| Notification to Successful Bidder | Monday, April 15th, 2024 |
| Contract Development | April 16th – 19th, 2024 |
| Start of Operations | Monday, April 22nd, 2024 |
| Launch | Phase 1: September 2024 |

*End of Schedule A*

**SCHEDULE B – BIDDER REFERENCES**

Bidders must provide three (3) references from clients who have obtained similar services in the last three (3) years. References should be external to King’s. If Canadian post-secondary references exist, be sure to include them here. King’s reserves the right to conduct reference checks.

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| --- |
| **Bidder Reference #1** |
| Company Name |  |
| Company Address |  |
| Contact Name |  |
| Contact Phone Number |  |
| Contact Email Address |  |
| Nature of Assignment |  |
| Date and Duration of Assignment |  |

|  |
| --- |
| **Bidder Reference #2** |
| Company Name |  |
| Company Address |  |
| Contact Name |  |
| Contact Phone Number |  |
| Contact Email Address |  |
| Nature of Assignment |  |
| Date and Duration of Assignment |  |

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| **Bidder Reference #3** |
| Company Name |  |
| Company Address |  |
| Contact Name |  |
| Contact Phone Number |  |
| Contact Email Address |  |
| Nature of Assignment |  |
| Date and Duration of Assignment |  |

*End of Schedule B*

**SCHEDULE C – RATE BID FORM**

Bids must include a detailed pricing structure for a Higher Education CRM Phase # 1 – Recruitment. Bidders must also extract key data and enclose it in the summary table below to provide a summary of recommendations and the associated costs. Additional rows and columns may be added to describe the Bidder’s pricing, if necessary. Bidders are asked to provide a five year projection of associated operating expenses (post implementation).

*NOTE: All prices quoted are to be in CAD and before taxes.*

|  |  |
| --- | --- |
| Recommendation | Cost |
| Base License |  |
| Installation and Professional Fees |  |
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*End of Schedule C*

**ATTACHMENT 1 – EVALUATION CRITERIA**

Evaluation of qualified bids will be undertaken by the Committee using the below stated evaluation criteria. Bidders are responsible for reviewing the evaluation criteria and providing appropriate and sufficient information to enable the Committee to accurately assess the bid.

Each bid will be rated on a scale of 1-10 (1 = poor, 10 = excellent) by the Committee members. An average of the ratings will determine the final rankings as a tool contributing to overall assessment of RFP submissions. The rating will not be the sole determining factor in the final decision. The Committee will make the final determination in the best interest of King’s.

Bids will be evaluated on many criteria deemed to be in the best interest of King’s, including, but not limited to:

* Fee arrangement and overall costs as provided in Schedule C;
* Proposed solutions ability to integrate with other solutions to create a 3600 view of students and their comprehensive record;
* Proposed solutions capacity to integrate with King’s student information system (Microsoft Access Database) and Western University’s student information system (PeopleSoft) as applicable
* Proposed solutions ability to meet the system integration requirements of King’s Enrolment Services and Informational Technology Departments
* Ability of Bidder to meet the Technology requirements as specified in Attachment 2;
* Ability of Bidder to meet the Business Needs requirements as specified in Attachment 2;
* Ability of Bidder to meet the Overall Business Alignment requirements as specified in Attachment 2;
* Bidders ability to provide a solution that satisfies King’s obligation to comply with the *Accessibility for Ontarians with Disabilities Act, Ontario’s Personal Health Information Protection Act,* and *Ontario’s Freedom of Information and Privacy Protection Act* as well as other applicable legislation as assessed by King’s and Western University.
* The implementation plan, including the ability to meet the schedule outlined in Schedule A;
* Overall desirability and quality of the proposal submitted, including a clear understanding of the requirements as outlined in this RFP;
* Past experience and qualifications of the Bidder;
* Verification of references supplied by the bidder, if necessary;

*End of Attachment 1*

**ATTACHMENT 2 – SCOPE OF OPPORTUNITY**

King’s University College is planning to assess and procure a Higher Education CRM solution for student recruitment. At present, King’s is using an internally built and maintained Microsoft SQL database to manage its recruitment and prospect cultivation strategies. Through this RFP King’s intends to select a cost-effective and fully featured CRM solution that will provide a compelling, personalized recruitment platform that advances King’s strategies for marketing to, progressively profiling, engaging with, and converting domestic and international prospects into applicants. The CRM solution should enhance King’s capacity to codify prospect interest with a view to facilitating the movement of high-priority prospects through the five stages of the admissions funnel: (1) prospects, (2) enquiries, (3) applicants, (4) accepts, and (5) enrolled student.

King’s does not have an existing higher education CRM solution. King’s is seeking to procure a higher education CRM solution with a long-term implementation plan of holistically managing the entire student lifecycle:

1. **Recruitment (Scope of Current RFP)**
2. Admissions and Marketing Features (Future Implementation with Selected CRM Solution)
3. Current Students/Student Success (Future Implementation with Selected CRM Solution)
4. Alumni Engagement (Future Implementation with Selected CRM Solution)
5. Advancement (Future Implementation with Selected CRM Solution)

Given King’s long-term implementation plan, the recruitment CRM solution must clearly demonstrate capacity to manage the entire lifecycle of King’s student experience ranging from but not limited to the areas of recruitment, admissions, marketing, student success, alumni engagement, and advancement. Central to King’s considerations for long-term implementation include advanced analytical features that empower the implementation of proactive retention strategies including student case management functionalities. Favored consideration will be given to a CRM solution with the ability to integrate with other solutions to create a 3600 view of students and their comprehensive record.

The CRM solution could be third party hosted cloud-based application and/or an on-premise locally hosted application and will need to be fully implemented and in production by September 1, 2024 (Phase 1: Recruitment). The solution will need the capacity to integrate with King’s student information system (Microsoft SQL Database) and Western University’s student information system (PeopleSoft) as applicable.

The CRM solution must satisfy King’s obligation to comply with the *Accessibility for Ontarians with Disabilities Act, Ontario’s Personal Health Information Protection Act,* and *Ontario’s Freedom of Information and Privacy Protection Act* as well as King’s Privacy Policies and other applicable policies and legislation as assessed by King’s and Western University.

**Phase 1 Success Factors:**

* Higher Education CRM solution for student recruitment to be implemented by September 2024.
* Ability for prospects to enter the CRM from a range of sources either connected to the CRM and/or from disparate sources.
* Ability for unique and personalized marketing campaigns via various modes (e.g., email, live chat, text, Whatsapp) as part of a larger prospect cultivation strategy for domestic and international audiences with a range of segmented stakeholder groups (e.g., prospective students, prospective student families/supporters, schools, guidance counsellors, and global partners). Note: For Phase # 1, the ability to generate prospect lists for import/use with King’s current marketing communication tools is required.
	+ Ability to dynamically rank prospect priority based on relevant variables.
	+ Ability to progressively profile stakeholder topic(s) of interest to facilitate tailored marketing strategies via the CRM as well as proactive connections with relevant services (e.g., Accessibility Services, Residence, International Student Services, etc.).
	+ Capacity for initial LiveChat interactions to be managed by an AI chatbot (e.g., responses to Admissions FAQs, connection to a Recruitment Officer).
	+ Ability to manage a “Global View” of all stakeholder engagement strategies on an individual per stakeholder basis as well as on a high-level.
	+ Ability to sustainably increase King’s prospect engagement capacity through a suite of intuitive stakeholder engagement tools that enable King’s Recruitment Team to strategically target their efforts and resources.
	+ Ability to track prospect applications, offers of admission, and summer academic orientation (SAO) bookings with a view to minimizing summer melt via differentiated stakeholder engagement campaigns geared toward students with offers of admission, those who have accepted their offer of admission, and those who have completed their SAO.
* Ability to manage recruitment initiatives (e.g., recruitment events, recruitment team bookings/appointments, recruitment calendar).
* Ability to extend the tools offered by the CRM (in a limited capacity) to in-country recruiters (e.g., recruiters permanently stationed in an international market) with a view to enabling in-country recruitment teams to tailor engagement strategies to regional audiences.
* Dynamic features for managing stakeholder wait times and employee workload.
* Ability to facilitate cross-departmental coordinated efforts to address the needs of stakeholders.
* Increase information sharing with the role-based permissions to manage user access.
* High-level operational dashboards, reports, and analytics that facilitate fact-based strategic decision-making as it relates to setting and advancing King’s strategic enrolment objectives.
* Full mobile device functionality.

**Scope of Services/Specifications:**

The scope of the Higher Education CRM solution for student recruitment will cover two business functions that centrally operate out of Enrolment Services at King’s:

1. Undergraduate Recruitment
2. Undergraduate Admissions

King’s is a small institution with limited capacity for internal database design/customization. King’s is looking for a solution that is intuitive, user-friendly, automated, and largely “Out-of-the-box.”. The goal is to optimize the use of King’s Admission, Recruitment, and ITS staff time for high yield activities via the CRM solution.

The functionality of the CRM solution must meet the system integration requirements of King’s Enrolment Services and Informational Technology Departments. This includes but is not limited to tracking prospects, tracking applications, registration, and applicant decisions between King’s and Western University’s SIS, the CRM solution, and the Ontario Universities’ Application Centre (OUAC).

We are highly specialized in two ways:

1. The Canadian and Ontario Post-Secondary Education (PSE) context is unique. Demonstrated success working with Canadian PSE clients essential. Demonstrated success working with Ontario PSE institutions that accept applications via OUAC is an asset.
2. King’s University College is an independent PSE institution affiliated with the University of Western Ontario (Western University). As such, experience implementing a CRM solution across partner institutions with a unified SIS is essential given the complexity of data access in said contexts.

At a high level, functional requirements include:

1. Domestic and International Recruitment Event/Activity Management
2. Admission and Recruitment Workflow Support and Management
3. Prospect Management/Engagement
4. Recruitment Marketing Campaign/Prospect Cultivation Management
5. Third Party Relationship Management
6. Multimodal Communication
7. Advanced operational dashboards, reports, analytics, and ad hoc query management.
8. Technical, security, privacy, and integration requirements.

More specifically, functional requirements include:

Technology:

* Data Security and Privacy:
	+ How is data stored, encrypted, and protected within the CRM system?
	+ What security measures are in place to prevent unauthorized access or data breaches?
	+ Compliance with data privacy legislation and regulations?
* Integration and Data Import:
	+ Must Integrate With: LaserFiche, King’s Microsoft SQL, SIS, Western University’s PeopleSoft SIS, ERP, Microsoft Office 365 Suite
	+ Must Integrate with and/or have Operability with for Lead Collection: Custom Viewbook, UniBuddy, SchoolFinder
	+ Should Work With (Not Via Integration): Constant Contact, Thru Text
	+ In Future Phases, should fully integrate with and/or have the capacity to replace: ERez, Residence Application Forms, ClockWork, Blackbaud’s Raiser’s Edge
	+ Ease of data import and migration process.
* Scalability and performance:
	+ Capability to handle large volumes of data and users during peak periods.
	+ System requirements for optimal performance.
	+ Performance benchmarks or SLAs
* Customization and Flexibility:
	+ Level of customization for fitting the university’s specific recruitment and admission processes/workflows.
	+ Availability of APIs or other methods for extending and integrating the CRM with other applications.
* User Access and Roles:
	+ User access control and permissions management.
	+ Flexibility in defining different user roles (e.g., registrar, admissions officers, recruitment officers, counsellors, reviewers).
	+ Limitation of access to sensitive applicant information based on roles.
* Automations and Workflows
	+ Support for automating repetitive tasks in the recruitment/admission process.
	+ Ability to create custom workflows for streamlined application review and decision-making.
	+ Availability of email notifications and alerts.
* Reporting and Analytics
	+ Reporting and analytics capabilities for tracking recruitment and admissions metrics.
	+ Custom report creation for analyzing specific data points or KPIs.
	+ Visualization tools for creating dashboards and geographical representations of data.

Business Needs:

* Cost and Affordability:
	+ How does the total cost of ownership (TCO) of the CRM product fit within the university’s budget?
	+ Are there any hidden costs, additional fees, or add-ons that need to be considered?
* User-Friendliness and Ease of Adoption:
	+ Is the CRM interface intuitive and user-friendly for all staff members?
	+ How much training and time will be required for staff to become proficient with the system?
* Vendor Reputation and Experience:
	+ Experience in the Canadian PSE Context?
	+ Experience in the Ontario PSE Context?
	+ Experience with Universities that process applications received via OUAC?
	+ What is the vendor’s track record in providing CRM solutions for PSE institutions?
	+ Review of customer reviews/references
* Customer Support and Service Level Agreement (SLA)?
	+ What level of customer support does the vendor offer and during what hours?
	+ Is there a well-defiled SLA in place for issue resolution.
* Adaptability to the Recruitment Process:
	+ Does the CRM product align with the specific requirements of King’s recruitment process?
	+ Can the CRM accommodate any unique or evolving recruitment procedures?
	+ Does the CRM present new recruitment opportunities?
	+ Does the CRM present the opportunity to decommission existing recruitment tools?
	+ Is the CRM mobile friendly (for on the road and/or in-country recruiting)?
	+ Do the marketing/prospect cultivation functionalities of the CRM work for both Domestic and International audiences or are there limitations?
	+ Can in-country consultants leverage the CRM’s capabilities within their markets?
* Adaptability to Admission Process:
	+ Does the CRM track the conversion of prospects, into applicants, into offered students, into accepts?
	+ Does the CRM allow for altered communication strategies for prospects, applicants, offered students, and accepted students?
* Opportunities for Improved Communication/Marketing/Engagement Strategies?
	+ Does the CRM product present opportunities for improved management of communications?
	+ Do the communication functions work for Domestic/International audiences?
	+ Are multiple modes of communication available as part of the communication/marketing/engagement strategies associated with the CRM?
* Ability to Replace/Improve Current Processes
* Potential of the CRM solution to be further implemented to perform functions associated with the following areas with a view to managing the full lifecycle of a King’s student from prospect, registered student, alumni, and potential donor.
	+ Future Phase 2:Admissions
	+ Future Phase 3:Current Students/Student Success
	+ Future Phase 4:Alumni Engagement
	+ Future Phase 5:Advancement
* Potential for a 3600 9 (Full Lifecycle) implementation based on a demonstrated record of 3600 implementations at Canadian PSE institutions.
* Future capacity to improve King’s enrolment, retention, and student success initiatives/strategies via data-informed decision making.
	+ Capacity for predictive modelling.

Overall Business Alignment:

* Overall Business Alignment with University Goals:

How well does the CRM product and vendor align with the strategic goals and objectives of the University’s recruitment and admissions functions.

The following table estimates the number of users and prospects engaging with the CRM for recruitment solution:

|  |  |
| --- | --- |
| **Item** | **Current Annual Volume:**  |
| Recruitment and Admissions Users: | ~ 17 |
| ITS Users:  | ~ 3 |
| In-Country Recruitment Consultants:  | ~ 4 |
| Undergraduate Prospects: | 13,000 to 20,000 |
| # of Applicants per Admission Cycle | ~ 3700 to 4000  |
| Registered Students (Full and Part-Time):  | 3,500 |

**Bid Requirements:**

Your bid must include at a minimum the following information in order to allow the Selection Committee to properly evaluate and fairly compare all submitted bids.

1. Provide background information on your organization (both history and current status) that you deem relevant or noteworthy.
2. Provide a timeline to indicate how the Launch date in Schedule A will be met. Include the resources that your organization is committed to provide for successful delivery on this initiative.
3. Any visuals (eg. screen shots, presentations, demonstration videos, etc) that you feel might help the Selection Committee understand your product.

Please note that the required forms and schedules indicated in the Request for Proposal Form are mandatory and if not provided then the bid will be disqualified. The above mentioned Bid Requirements are merely suggestions on how to ensure the Selection Committee has all the appropriate information to be able to evaluate fully.

*End of Attachment 2*