REQUEST FOR PROPOSAL # 192

Blinn College invites qualified firms/individuals to submit Proposals for:

CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

Proposals will close on:

April 28, 2022 @ 2:00 PM CDT

Sealed Proposals must be submitted to the following location with the proposal # in the lower left corner of the envelope. Please include 1 hard copy and 1 flash drive copy of the submitted proposal. Faxed and e mailed proposals will not be accepted.

Mail Proposals to: Blinn College Purchasing
902 College Avenue
Brenham, Texas 77833

Deliver Proposals to: Blinn College Purchasing
902 College Avenue – Arts and Sciences A203
Brenham, Texas 77833

RFP# 192 - Customer Relationship Management System

Proposals that arrive after the closing date and time will be rejected. Proposals will be read aloud at the above referenced closing. All vendors are invited to attend the closing. Time/date stamp clock in the Purchasing Department shall be the official time of receipt. Responses received in the Purchasing Department after submission deadline shall be returned unopened and will be considered void and unacceptable. Mailing of a Proposal does not ensure that the Proposal will be delivered on time or delivered at all. The proposer (not the college mail system) is solely responsible for ensuring the proposal is received prior to the bid opening. Delivery at any other campus location or any other department is unacceptable.

Blinn reserves the right to reject any and/or all Proposals, to award contracts as may appear advantageous to Blinn, and to waive all formalities in offering.

Ross Schroeder – Director of Purchasing
PURPOSE
Blinn College District, the Junior College District of Washington County, is receiving proposals from qualified vendors to establish a contract for a CRM solution for higher education that can serve multiple audiences including current and prospective students.

The specifications attached to these instructions to vendors establish a standard of quality desired by the District. **Any reference to a specific brand or model is for quality standard only.** Any vendor may submit their proposal on any brand / model, of equal or greater quality that complies with the specifications. Blinn reserves the right to make its selections of materials purchased, based on its best judgment as to which articles substantially comply with the strength and quality required by the specifications.

OPEN RECORDS

It is understood by submitting a proposal to Blinn College District, the document becomes part of an open record. Any request for your proposal through the open records act will be honored. Copies of your proposal will be supplied to the requesting party.

Blinn College is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, sex, religion, national origin, age, disability, veteran’s status or any other legally protected status in employment.
RFP #192 Calendar

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Action</th>
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<tbody>
<tr>
<td>March 29, 2022</td>
<td>Advertisement #1</td>
</tr>
<tr>
<td>April 5, 2022</td>
<td>Advertisement #2</td>
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<tr>
<td>April 13, 2022 @ 5:00 PM CDT</td>
<td>Last day and time to submit email inquires</td>
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<td></td>
<td>Submit to: <a href="mailto:ross.schroeder@blinn.edu">ross.schroeder@blinn.edu</a></td>
</tr>
<tr>
<td>April 18, 2022 @ 5:00 PM CDT</td>
<td>Addenda issued, if any, communicated by e-mail</td>
</tr>
<tr>
<td>April 28, 2022 @ 2:00 PM CDT</td>
<td>Deadline for Submission, RFP #192</td>
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<td>Blinn College District Purchasing</td>
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<td></td>
<td>Attn: Mr. Ross Schroeder, Director of Purchasing</td>
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<td></td>
<td>902 College Ave., Arts and Sciences A203</td>
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<td></td>
<td>Brenham, Texas 77833</td>
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<tr>
<td>May 16, 2022</td>
<td>Targeted Implementation Date</td>
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**TERM OF AGREEMENT:**
Blinn College District expects to enter into an agreement with the successful Respondent for a three (3) year period with a written additional one (1) year renewal, mutually agreed upon by both parties.

**TECHNICAL PROPOSAL:**
If Blinn College District selects your company for award, provide a detailed plan on how you propose to meet required scope of work, technical requirements, testing, and implementation.Submitted proposal shall be focused on your understanding of Blinn’s current environment.

**VENDOR REQUIREMENTS:**

1. Demonstrate a minimum of five (5) years’ experience pertaining to desired requirements
2. Assign one (1) qualified representative as the lead contact for Blinn College District. The Vendor’s lead contact must be familiar with Blinn’s local marketplace, as well as the State of Texas.
3. Provide information (name, title, and area assigned) on the number of full-time staff members specifically assigned to each of the following areas: marketing/promotions, retail merchandising, contract compliance, enforcement and legal counsel.
4. Be available by phone during college business hours of 8:00AM to 5:00PM, Central Standard Time, Monday through Friday.
EVALUATION CRITERIA

An Evaluation Committee will review all proposals according to the criteria stated herein. The committee’s evaluations will be based on all available information including qualification statements, subsequent interviews, reports, discussions, reference checks, and other appropriate checks.

Proposal will be evaluated using the following criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Points</th>
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<tbody>
<tr>
<td>Technical Proposal</td>
<td>35</td>
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<tr>
<td>Vendor Experience</td>
<td>15</td>
</tr>
<tr>
<td>Timeline for Deliverables</td>
<td>15</td>
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<tr>
<td>Cost/ Best Values</td>
<td>20</td>
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<tr>
<td>Technical Support Offered</td>
<td>10</td>
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<tr>
<td>Responsiveness</td>
<td>5</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
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</tbody>
</table>
SCOPE OF WORK

Project Summary
Blinn College District is expanding its CRM capabilities. The college seeks proposals to transition from our current CRM solution (“the current CRM”) to a new CRM solution (“the CRM”) that will allow the college to broaden its CRM capabilities in order to better our multiple internal stakeholders as well as external audiences.

The CRM will be used throughout the college for email communication with students, customer facing forms, and documenting all interactions with current students, prospective students, or alumni. The CRM should be flexible & scalable enough to incorporate usage from many additional departments in the future. The college is seeking a vendor that will collaborate with the institution for a solution that addresses the following expectations; the solution will:

1. Enhance the efficiency & effectiveness of the staff,
2. Increase conversion rate through on-going dialogue, and
3. Create long-lasting, mutually beneficial relationships with college audiences.

This solution should provide a flexible pedagogy-driven platform that will be used by multiple stakeholders in multiple contexts that range from recruitment & inquiries, advising, and alumni communication. To this end, the College is looking for a CRM that supports student & staff engagement in a number of ways, including an engaging and flexible design, the ability to create multiple reports & queries, manage events & event data, and the ability to view & track student (or prospective student) profiles, & their communication plans. This partnership will require flexibility and a true commitment to product implementation, industry best practices, and ongoing responsive support.

In Scope:

Obtain a highly scalable and flexible solution that has the ability to support all college departments (e.g. Alumni Relations, Financial Aid) and multiple campus-site/locations.

Install and configure the CRM system. Incorporate existing automated tasks, workflows, and retention policies from the current CRM for the test and production environments.

Integrate the CRM with the college’s Single Sign-On (“SSO”) system so that 1) employees can log into the system using their Blinn username and password and 2) the CRM is protected by Blinn’s multifactor authentication system, Duo. The college’s SSO system is based on Ellucian Ethos Identity and speaks SAML and CAS. In your proposal, be sure to include

1) an estimate of how many hours will be required from college IT to effect the integration and
2) any additional software required to effect the integration.

Integrate the CRM with the college’s Banner Student Information System (“the SIS”). The intended integration is one-way: from the SIS in to the CRM, either push or pull. Updating the SIS from the CRM is not in scope. In your proposal, be sure to include 1) an estimate of how many hours will be required from college IT to effect the integration and 2) any additional software required to effect the integration.

Setup of security rules, user access, and roles.

Minimum migration of select data from current CRM.
User acceptance testing with all system bugs or workflow issues corrected prior to going live with the new system.

In-depth training for the end-users to successfully adapt to the new system and to take advantage of all system features & functionality.

Go-live with the CRM and migrate end-users to the new system.

Maintenance and support plan to support the system and end-users during & post-implementation.

Free and responsive support from the vendor via multiple communications tools (ie. live chat, email or phone)

Online/on-demand and on-going training for users for during and post implementation

**Out of Scope:**

The following items are out of scope for this project, and an approved Change Request will be required to add any of these items to the CRM project scope:

- Any computer hardware.
- Additional interfaces or integrations between the CRM system and other college systems other than those explicitly discussed in this document.
- Major changes to the current admissions/enrollment process.
- Enabling the CRM to update data in the college’s other systems e.g. the SIS,

**Implementation:**

**Timeline**
A fully-functioning production system must be in place by August 1, 2022 with texting in place by June 19, 2022. All other milestones to be determined jointly by the vendor and Blinn.

**Procedures & Deliverables**

**Mapping:** The vendor will lead in the mapping and connecting of all data and systems required

**Training:** The vendor is expected to provide training for Staff (technical) and Train-the-Trainers (pedagogy + technical).

**Documentation:** The vendor is also expected to provide manuals and supplementary online resources for Faculty and Administrative stakeholders.

**Test/demo Instance:** The vendor will provide access to the demo/instance/environment throughout the implementation process.
FUNCTIONAL REQUIREMENTS

Contact Management: The system must provide the capability to document & track all interactions throughout the prospective student enrollment funnel and the student lifecycle; from the first contact, through the application process, and the alumni engagement process. The system should include robust and user-friendly capabilities for categorizing histories of interactions & correspondence, audit trails of activities, and customer attributes, including:

- Ability to house sensitive information related to a Contact, such as acceptance/not accepted notices, payment deadlines, drop deadlines, enforced withdrawal notifications, vaccination & other enrollment requirements, & graduation information.
- Ability to create, modify, or view notes that have been entered for a contact or on an interaction with the contact by another CRM user.
- Ability for CRM users to upload documents to be stored with the contact’s profile (and for end-users to view them without downloading them first).
- Ability for the institution to archive and preserve contact profiles that are no longer affiliated with BLINN.
- Ability to create, modify, delete attributes for contact profiles.
- Ability to view full contact history on profile.
- Ability to view the student lifecycle.
- Ability to group and organize contacts via tagging, folders, groups, status, etc.
- Ability to identify suspected matches using multiple combinations (name & birth date, phone number & name, etc.).
- Ability to move, rename, or merge/un-merge contact profiles with no to little involvement from ITS.
- Ability to track & view contact profile changes via audit trail or history.
- Ability to create non-student record types (ie. HS Counselors, Parents/Family, Alumni, Donors, Community Stakeholders etc.)
- Ability to edit non-student record types
- Ability create new non-student record types
- Ability to import in user friendly manner from various external sources
- Ability to help eradicate duplicates with user-friendly data clean-up processes

Inquiries, Forms, Applications: The system must provide the ability to select, create, modify customer facing forms for different purposes. The system should include capabilities to support inquiries, forms and applications, by

- Ability to have a link, or embedded form, on the Blinn website for online inquiries.
Ability for the data from inquiries, request for information forms, & applications to be automatically imported into the CRM.

**Mobility**
The CRM must be accessible while out in the field for campus visits & must be completely mobile-compatible i.e. provide mobile-responsive forms for e.g. prospective student entry.

Ability to have a link, or embedded form, on the Blinn website for online inquiries.

**Customization:** The system must provide robust and user-friendly capabilities for customizing all aspects aligning items with customer facing pages, and communications, including:

- Ability to offer customization of customer facing forms.
- Ability to offer customization of reports.
- Ability to offer customization of data points collected & stored in contact profile.
- Ability to offer customization of email & SMS text messaging templates.
- Ability to offer customization of contacts & users.
- Ability to easily map new data connections to linked college systems such as the student information system.

**Communications.** The system must provide robust and user-friendly capabilities for creating, publishing, viewing, monitoring, & tracking all communications with students, prospective students, & alumni/donors, including:

- Ability to offer unlimited emails/letters to contacts.
  - Ability to use letter templates
  - Ability to run simultaneous email campaigns to different audiences by different administrative staff.
  - Ability to validate email & physical address to reduce errors in data entry.
  - Ability to easily create new email or SMS templates.
  - Ability to choose from a variety of friendly pre-built aesthetically-pleasing templates (built-in HTML) with the option to select from various color schemes & data points/fields.
  - Ability to schedule communications based on group/tag.
  - Ability to view ‘communication plan’ per student.
  - Ability to preview the email template/design and deliverability prior to generating the email.
  - Ability to offer or integrate seamlessly with a live chat capability.
  - Ability integrate on the website as the answer library via a Chat bot or similar experience.
  - Ability to offer or integrate seamlessly with an SMS texting capability.
    - Two-way SMS texting/broadcasting capabilities, one way preferred.
    - Bulk SMS texting is a must
    - Must be able to personalize and send
    - Ability to use emojis
  - Ability to send a single email to a single contact.
- Ability to track and view campaign results
- Ability to view email analytics such as open rates, unopened rates, link click rates.
Ability to communicate to targeted groups on email analytics

Ability to send communication to a list of students collected by another source, (ie. excel list extracted from Argos, purchased inquiries, etc). Ability to handle ad hoc imports from e.g. excel, CSV.

Ability to build and send automated communication flows for various segments. Ideal functionality needed:
  - Ability to cancel a broadcast/communication directly and easily
  - Ability to pull personal data like specific holds listed for a student

A/B Testing ability

Ability to execute and track all communications within the product (or an integration option):
  - Email
  - Direct Mail
  - SMS Texting
  - Phone Calls
  - Social Media
  - Website Personalization

Ability to build and send automated communication flows for various segments. Ideal functionality needed:
  - The ability to cancel a broadcast/communication directly and easily
  - Pull personal data like specific holds listed for a student

**Recruiting:** The system must provide robust and user-friendly capabilities for assigning, viewing, and managing recruiters to a certain territory or contact, including:

  - Ability to support territory management by high school as well as regions.
  - Ability to provide recruiter collection of prospect information.
  - Ability to support recruiters by tracking students through their enrollment funnel.
  - Ability to easily customize views, dashboards, & reports for recruiters to see year-to-year comparisons & conversion rates for their territories.
  - Ability to automate email reports to stakeholders (ie. recruiters & administration).
  - Ability to group contacts based on physical address or zip code.
  - Ability to see map view or distance to metropolitan areas.
  - Ability to record data against a particular event, place, group, or day (session).
  - Ability to upload contact lists created in Excel or other formats.
  - Ability to provide customized student enrollment checklist/portal
  - Ability to create a “predictive” model score for records
Event and Campus Experience

Event Planning: The system must provide robust and user-friendly capabilities for creating, viewing, and managing events, including:

- Ability to create online forms for event registration.
- Ability to create a communication plan for an event.
- Ability to send an automated email upon registration of event.
- Ability to capture the event as an attribute on contact profile.
- Ability to add event as an attribute to contact profile.
- Ability to view list of registrants for an event.
- Ability to track attendance for an event.

Campus Visit Experience

- Ability to provide a web interface where anyone can schedule a campus visit.
- Ability to link communications and automate them based on event registration, including:
  - Event email & text reminders 1-2 days before event
  - Event thank you emails 1-2 day after event
  - Tour & event reminders with an easy user interface (currently needs to be coded in html)
- The ability to brand and customize events calendar with different calendar availability for each tour site and event.
- Build/save survey feedback

Reporting & Analytics: The system must provide robust and user-friendly capabilities for generating pre-defined and custom reports on email campaign results, individual contact details, enrollment conversion rates, and recruiter data, including:

- Ability to create various target groups by powerful filter engine & segmentation capabilities.
- Ability to view summary data for any given population (average, median, mean, standard deviation, counts)
- Ability to create custom “views” or dashboards tailored to specific audiences.
- Ability to produce, export and save report in various formats (PDF, CSV, XLS, etc.)
- Ability to generate status reports of various kinds to assist with managing processes & rates (e.g., average time it takes students to complete application; how many applications are incomplete; which recruiters have the highest student conversion rate, etc.).
- Ability to extract examples that show individual students’ progress over time (e.g., by interactions & communications).

Please provide a descriptive list of the pre-defined reports available through your system.

Ability to generate custom reports via the user interface
Ability to easily track progress of individual or groups of contacts against trends, status, or set goals.

Ability to save and view prior versions of reports.

Ability to segment as necessary.

Ability to Schedule regular daily, weekly, monthly & annual comparison reports for the admissions funnel and enrollment.

Ability to have different levels of access and user roles for all departments across the College to be able to access and utilize the data.

**Usability & Design:** The system must be accessible by persons with disabilities; extremely easy to use, and offer a clean, modern, and attractive interface:

The system must be accessible to persons with disabilities (e.g., section 508 compliant, NFB Gold Certification, etc.).

Please provide screenshots and/or other evidence (user testimony, recorded feature demos, awards or certifications) of the usability of your product.

Permits full rebranding of the logo and color schemes.

The system should be admissions focused (terminology & workflow).

Ability to search/query by all attributes & data associated with contact profile.

Please provide a Voluntary Product Accessibility Template (VPAT) or Accessibility Conformance Report (ACR) for all proposed solutions (e.g. for both on-prem and hosted, if both are being proposed).

**Documentation:** The system must offer complete online documentation for users in all roles.

Describe system level documentation for administration, development, and customization.
## TECHNICAL REQUIREMENTS

### SOFTWARE DEPLOYMENT

<table>
<thead>
<tr>
<th>General</th>
<th>Solution should be highly scalable and flexible with the ability to support all College departments and multiple campus-site/locations</th>
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<tbody>
<tr>
<td>Software Deployment: SAAS Proposal</td>
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<tr>
<td>User Interface</td>
<td>Web-based and https and supports all major browsers (Edge, Safari, Firefox, Chrome)</td>
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<tr>
<td>Application Performance</td>
<td>UI response time to data entry/save should be less than five (5) seconds</td>
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<tr>
<td>Failover/Disaster Recovery</td>
<td>In the event of primary application service down, database damage/corruption, switch to failover site should be less than two (2) hours</td>
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<td>In the event of database damage/corruption, recovery (restore) point should be no greater than four (4) hours prior to failure</td>
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<td>Failover site must be geographically distant from primary site</td>
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<tr>
<td>Database</td>
<td>Database backups must be stored at a geographically distant site from primary</td>
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<tr>
<td>Application Availability (uptime)</td>
<td>Uptime should be 99% or better</td>
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<td>Technical/Functional Support</td>
<td>BLINN’s typical hours of operation are 8am-5pm, Monday through Friday, Central Time. Provide your typical technical/functional support hours.</td>
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<td>Production-down support/initial contact should be less than thirty (30) minutes</td>
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<td>Scheduled Outages</td>
<td>Minimum of twenty-four (24) hour notice to BLINN</td>
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<td>Upgrades/Patches</td>
<td>All upgrades/patches should be installed in BLINN’s test instance and BLINN will be provided at least fourteen (14) days review time prior to production upgrade</td>
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<td>All upgrades/patches should be applied to production outside of M-F 7am-6pm CT</td>
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<td>Provide the patching program that addresses:</td>
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<td>How often is the provider patching system</td>
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<td>How long does it take to apply a critical, high, medium, low patch</td>
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<td>How often do they scan for vulnerabilities</td>
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<td>How often do they look for anomalies and respond to those anomalies</td>
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<tr>
<td>Application Source Code</td>
<td>Source code should be held in escrow. In the event of Proposer going out of business, source code reverts to BLINN.</td>
</tr>
<tr>
<td>Data Center Operations- Perform operations and maintenance throughout the life of the contract. Add timely updates and security patches to components of the production, test and all other accessible environments, including but not limited to:</td>
<td>Hardware</td>
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<td></td>
<td>Operating systems</td>
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<td></td>
<td>Database systems</td>
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<td>Application and other software</td>
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<td></td>
<td>Utilities for systems, database, software, communications</td>
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<td></td>
<td>Communications software</td>
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</table>
### Mobile Device Interface

Devices supported in order of preference:
1. Tablets (Windows, Android, and IOS) Wi-Fi only *(preferred)*
2. Smart phones (Android and IOS) Wi-Fi only
3. Smart phones (Android and IOS) cell

Secured Communication:
1. https via TLS 1.2 or higher

Communication Protocols in order of preference:
1. Wireless *(preferred)*
2. Cell

Offline functionality (wireless and cell not available)
1. Updates, create functions stored until communication available

## INTEGRATIONS

### Banner SIS Integration

The system must provide robust and seamless integration with the Ellucian Banner Student Information System (or an open API for building such an integration) to facilitate data sharing and exchange for a variety of purposes, including: provisioning users and groups (or courses/degree plans) in the CRM system; generating reports filtered by academic and demographic criteria stored in the SIS, (for example, all graduating seniors, all first year Hispanic females, all students in the electronic engineering program, etc.)

Please include in your proposal:
- A list of the specific Banner versions with which you integrate;
- Whether the CRM requires any third party software for Banner integration;
  - If so, any associated costs, and;
- A general sense of the time and effort required from college IT to effect this integration.

### Authentication/SSO

CRM must integrate with SAMLv2 *(preferred)* or CAS. Please detail in your response 1) any additional costs required for the integration, and 2) the hours and skills required from customer IT to accomplish the integration. Please attach any implementation documentation in your proposal.

Please identify any and all third-party integration tools **required** for your solution, i.e., letters, forms, messaging, middleware, etc.; any additional costs associated with acquiring and maintaining those tools; the number of local IT hours required to acquire, configure, and maintain those tools.

Please list all APIs available to customers who wish to develop custom integrations.
Other Integrations: For each of the systems listed below please state if the CRM integrates with that solution. For those that do, please describe: 1) how the CRM integrates with that system; 2) typically how many customer IT hours are required to effect an integration; 3) additional costs are associated with the integration. If there is existing implementation documentation, please reference or attach it.

- Apply Texas
- Ellucian Ethos
- Ellucian Experience
- SharePoint
- D2L Brightspace
- Hannon Hill Cascade

ACCESS CONTROL

The system must provide a robust and flexible model for roles, groups, and permissions that allows students, advisors, instructors, mentors, evaluators, etc. to easily locate and access their own portfolios, as well as those of the users with whom they are collaborating, including the ability to:

- Assign roles and permissions on per context basis (e.g., a single user can view & modify only a particular group or one contact).
- Designate particular users to control who can view, export, modify certain fields & records (field, function, & feature-level security).
- Designate users who can manage specific groups or roles, without giving those users full administrative access to the application (i.e. delegated authority).
- Define users with multiple roles and access to multiple departments and user groups.
- Grant or restrict access based on location, department, group, or field.
- Integrate with Active Directory groups or SAMLv2 attributes for access rights.

INFORMATION SECURITY (for SAAS solutions only)

Data at Rest:

- Data at rest must be encrypted
- The keys are always stored on a separate server
- The keys never leave the key server
- The key is never stored with the encrypted data

Data location inventory. Please include in your proposal an inventory of

- Which servers house the data
- Where the physical servers reside
- Identify what other data exist on that server

If so, Identify if other companies or other third party have access to that data

Compliance

- Solutions must be FEDRamp/TXRamp compliant.
- Response must include a completed [Higher Education Community Vendor Assessment Tool](https://hecvat.org) (“HECVAT”)

Please include in your response any additional information about the proposed hosted solution and specific information-security laws such as FERPA, HIPAA, GDPR, etc.
TERMS, CONDITIONS AND AGREEMENTS

1.000 ANNULMENTS AND RESERVATIONS:
1.001 Blinn College District reserves the right to reject any and all proposals and waive any and all formalities and conditions. The College reserves the right to retain all proposals received for 30 days prior to taking any action and vendors shall not withdraw their proposal at any time thereafter. Blinn College shall accept the proposal determined by the College to be in its best interest. It is not the intent of any condition or specification in the RFP to prohibit any responsible vendor from submitting a proposal.

1.002 This Request for Proposal is not construed as a CONTRACT or a COMMITMENT of any kind. The request for proposal does not commit Blinn College to pay for any costs incurred in the preparation and submission of specifications or for any costs incurred prior to the execution of a final offer.

1.003 Blinn is not obligated to purchase any item or service, if funds are not allocated by the Grant, legislative session or the Board of Trustees.

2.000 VENDOR'S OBLIGATIONS:
2.001 Substitutions will not be allowed after a proposal has been submitted for review, and will not be delivered instead of the item proposal, unless the item is of a higher quality than the item specified and approved by the Director of Purchasing.

2.002 Any item that does not perform or meet the specifications or warranty, or as claimed by the vendor, will be replaced at no cost to the College.

2.003 Any specification a vendor may not agree with must be submitted in writing to the Purchasing Office four (4) days in advance of the proposal closing date.

2.004 Prompt payment discounts shall be listed on the proposal form.

2.005 In proposing, give complete information in spaces provided; otherwise your proposal offer may not be given consideration. All proposal offers must be signed to be considered.

3.000 AWARD DETERMINATION / OBLIGATIONS BY THE COLLEGE:
3.001 Blinn College District will award this service to the vendor providing the best value as it deems to be in the best interest of the college.

3.002 In determining to whom to award a contract, the district shall consider:
   A. the price(s) proposal.
   B. the quality of the vendor’s goods or services.
   C. delivery of services in a timely manner.
   D. the reputation of the vendor and of the vendor’s goods or warranty services.
   E. the extent to which the goods or services meet the district’s needs.
   F. the vendor’s past relationship with the district.
   G. the total long-term cost to the district to acquire the vendor’s goods or services; and
   H. any other relevant factor that a private business entity would consider in selecting a vendor.

3.003 The College may make such investigations, as it deems necessary, to determine the ability of the vendor to provide satisfactory performance in accordance with the specifications. The vendor shall furnish to the College all such information and data for this purpose as the College may request.
4.000 **INTERPRETATIONS OF THE SPECIFICATIONS:**

4.001 Only the interpretation or correction so given by the College, in writing, shall be binding and prospective vendors are advised that no other source, outside of the college, is authorized to give information concerning, explain or interpret, the proposal document.

4.002 Every request for such interpretation or correction must be in writing to the Director or Purchasing. All such interpretation and supplemental instructions will be in the form of written addenda to the proposal documents prior to the proposal opening. Your questions concerning the proposal specifications must be submitted in writing. We will return a written answer to your company.

5.000 **DELIVERY:**

5.001 Delivery of equipment and services must be made by the successful vendor to:

Blinn College District  
902 College Avenue  
Brenham, Texas 77833

5.002 No allowance for loss, breakage, damage or difficulties shall be made.

6.000 **BILLING AND PAYMENT/DISCOUNTING:**

6.001 All invoices are to be submitted and mailed to:

Blinn College District  
902 College Avenue  
Brenham, Texas 77833

6.002 Unless otherwise stated on the purchase order, payment will be net thirty (30) days after receipt of a correct invoice. If a cash discount is allowed for prompt payment, please indicate on the invoice. Partial payments may be paid if partial shipments have been made. Any penalty for delayed payment must be stated on the invoice.

7.000 **TAX EXEMPTIONS:**

7.001 Prices Proposed SHALL NOT INCLUDE FEDERAL EXCISE OR STATE SALES AND USE TAXES as the COLLEGE is exempt from the payment of these taxes. Exemption Certificates for the Federal Excise Tax and State of Texas Sales Tax will be furnished upon request.

8.000 **PRICE QUOTATIONS:**

8.001 Lump sum price. The unit price shall include all costs of labor, profit, insurance, FOB freight, etc to make operational and cover all work outlined in the specifications of this project.

8.002 Proposals must be submitted on the forms provided to insure complete uniformity of wording of all Proposals. Proposals may be rejected if they show any omissions, alterations in wording, conditional clauses, or irregularities of any kind.

9.000 **RIGHT OF VENDOR SELECTION:**

9.001 You are notified that although the College is required to submit purchases of all contracts of $25,000 to competitive bidding, it is not required to accept the lowest proposal. In such purchasing the lowest proposal may be rejected if the College, in the exercise of its best judgment, feels that the proposal of one other than the low proposer will best serve the interest of the College.

9.002 Blinn College District reserves the right to accept or reject any or all proposals in its entirety and/or waive
all formalities. This inquiry implies no obligation on the part of the buyer, nor does the buyer’s silence imply any acceptance or rejection of any quotation offer.

10.000 REFERENCES:
10.001 Please provide educational references in addition to non-educational references.

11.000 CONFLICT OF INTEREST:
11.001 No public official shall have interest in this contract, in accordance with Vernon’s Texas Codes Annotated, Local Government Code Title 5, Subtitled C, Chapter 171 and Chapter 176.

12.000 ETHICS:
12.001 The vendor shall not accept or propose gifts or anything of value nor enter into any business arrangement with any employee, official or agent of Blinn.

12.002 House Bill 1295
Effective January 1, 2016, Blinn College District shall comply with the “Disclosure of Interested Parties” requirements mandated by HB 1295, as implemented by the Texas Ethics Commission. Briefly stated, contracts for goods or services which require an action vote by Blinn’s governing body may not be executed by the college until the awarded vendor presents a signed and notarized form disclosing the interested parties to the contract. The awarded vendor will be required to complete the form prior to execution of the contract. If the awarded vendor does not comply, the award may be revoked. The filing application and information can be accessed at:

https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm

13.000 STATE LAW REQUIREMENTS:
13.001 This agreement will be governed and construed according to the laws of the State of Texas.

VENUE The parties agree that regarding any dispute or litigation that may arise in the execution and performance of this contract, that venue for all proceedings, judicial or otherwise shall be in “Washington County”, Texas

13.002 All equipment and services furnished under this contract shall comply with applicable laws, ordinances and regulations. The proposer shall give all notices and comply with all laws, ordinances, rules and regulations, and without such notice to the authorized Owner’s representative, the proposer shall bear all costs arising there from.

13.003 On May 30, 1995, Governor, George Bush, signed Senate Bill 1. It became effective on the day he signed it. The following is a requirement included in this law. It is mandatory that the College must include this in all Proposals. Each vendor must respond to this section of the law.

Section 44.034 TEC. Notification of Criminal History of Contractor. (This section does not apply to a publicly held corporation).
(a) A person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The school district must have advance notice that a person, owner, or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.
(b) A school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract.
13.004 **State of Texas Government Code Chapter 176** –

Vendors submitting a response to a Blinn College RFB/RFP are responsible for complying with all applicable laws, ordinances and regulations including the provisions of the State of Texas Government Code Chapter 176. As applicable, the person submitting a response to a RFB/RFP must complete and submit a Conflict of Interest Questionnaire form CIQ, in a format approved by the Texas Ethics Commission. This form is to be included with your proposal. A copy of the CIQ form can be found at the Texas Ethics Commission Web site.

14.000 **UNIFORM & COMMERCIAL CODE:**

14.001 This writing and subsequent interview information given and forward to the College shall be a sole and final expression of the agreement between the College and the vendor, and is intended also as a complete an exclusive statement of the terms of their agreement. Whenever a term defined by the Uniform Commercial Code is used in this agreement, the definition contained in the Code is controlling.

14.002 This agreement shall be governed by the laws of the State of Texas. By submitting a signed proposal, the vendor certifies that the company does not discriminate against any employee or applicant for employment because of race, religion, color, sex or national origin, and certifies that the company complies with equal employment opportunity regulations.

15.000 **ENTIRE AGREEMENT**

15.001 This proposal document, the authorized purchase order, and/or a signed contract constitute the entire agreement. No other document will prevail.

16.000 **CANCELLATION**

16.001 Blinn College District shall have the right to cancel for default all or any part of the undelivered portion of this contract if the Awarded Vendor breaches any of the terms hereof including warranties as proposal or if the Awarded Vendor becomes insolvent or commits acts of bankruptcy. Such right of cancellation is in addition to and not in lieu of any remedies which Blinn College District may have in law or equity.

**WHERE TO ADDRESS QUESTIONS**

Proposal questions should be referred to:

**Ross Schroeder, Director of Purchasing**
Blinn College District  
902 College Ave  
Brenham, TX 77833  
(979) 830 4118  
e-mail: ross.schroeder@blinn.edu
Having carefully examined the specifications and conditions prepared by the Purchasing Office, Blinn College and agreeing to conform to conditions set out in the contract, we, the undersigned, propose to furnish collection services.

The undersigned affirms that they are duly authorized to execute this contract, that this company, corporation, firm, partnership or individual has not prepared this proposal in collusion with any other vendor, and that the contents of this proposal as to prices, terms or conditions of said proposal have not been communicated by the undersigned or by any employee or agent to any College employee, board member, or other person engaged in this type of business prior to the official acceptance of this proposal.

1. In the event the undersigned vendor intends to deviate from the proposal, condition, or specifications contrary to those listed in the “specifications”, “Standard Terms and Conditions”, “Instructions” and other information attached hereto, all such deviations must be attached along with complete and detailed conditions and information.

2. All proposer must complete this page, sign, and return the sealed proposal. If the page is not signed the proposal may be considered Non-Responsive.

3. Our proposal is submitted with (check appropriately):  
   
   ______ No Deviations  ______ Yes Deviations

_________________________________________  __________________________________________
Name of Firm                          Agent/Title/Official Position

_________________________________________  __________________________________________
Signature of Company Official Authorizing the Proposal  Company Official Printed Name
Felony Conviction Notification

State of Texas Legislative Senate Bill No. 1, Section 44,034, Notification of Criminal History, Subsection (a), states a person or business entity that enters into a contract with a College must give advance notice to the College if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.

(I) (We), the undersigned agent for the firm named below, certify that the information concerning notification of felony convictions has been reviewed by me and the following information furnished is true to the best of my knowledge.

COMPANY NAME: __________________________________________

AUTHORIZED PRINTED NAME: __________________________________________

Title: _____________________________________________________________________

Check the appropriate box and sign the form.

☐  My firm is a publicly-held corporation, therefore, this reporting requirement is not applicable.

AUTHORIZED SIGNATURE: __________________________________________

☐  My firm is not owned nor operated by anyone who has been convicted of a felony.

AUTHORIZED SIGNATURE: __________________________________________

☐  My firm is owned or operated by the following individual(s) who has/have been convicted of a felony.

Name of Felony: __________________________________________

Details of Conviction(s) ______________________________________________________________________

______________________________________________________________________________________

______________________________________________________________________________________

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______________________________________________________________________________________

Authorized SIGNATURE: __________________________________________

6
Proposal Document

Any brand reference is for quality standard only. Proposals for other brands will be accepted as long as the item offered is of equal or greater quality. Determination of the quality offered will be the sole determination of the Blinn College District personnel purchasing the service.

BY SIGNING THIS PROPOSAL DOCUMENT, VENDOR AFFIRMS THEY HAVE READ THE TERMS AND CONDITION, SPECIAL TERMS AND CONDITIONS AND THAT THEY UNDERSTAND AND AGREE WITH THE TERMS AND CONDITIONS.

________________________________________
Company Name

________________________________________
Company Address

________________________________________
City, State, Zip

____________/____________
Phone Number / Fax Number

________________________________________
Authorized Representative Printed Name

________________________________________
Authorized Representative Signature
CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.
This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a vendor who
has a business relationship as defined by Section 176.001(1)-(e) with a local governmental entity and the
vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later
than the 7th business day after the date the vendor becomes aware of facts that require the statement to be
filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.009, Local Government Code. An
offense under this section is a misdemeanor.

1 Name of vendor who has a business relationship with local governmental entity.

☑ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated
completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which
you become aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the
officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer.
Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form
CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income,
other than investment income, from the vendor?

☑ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction
of the local government officer or a family member of the officer AND the taxable income is not received from the
local governmental entity?

☑ Yes ☐ No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or
other business entity with respect to which the local government officer serves as an officer or director, or holds an
ownership interest of one percent or more.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts
as described in Section 176.005(a)(2)(B), excluding gifts described in Section 176.005(a-1).

7 Signature of vendor doing business with the governmental entity ____________________________ Date __________

Form provided by Texas Ethics Commission www.ethics.state.tx.us Revised 11/30/2015
CERTIFICATE OF INTERESTED PARTIES FORM (HB 1295)

The Texas Government Code §2252.908, and the rules issued by the Texas Ethics Commission found in Title 1, Sections 46.1, 46.3 and 46.5 of the Texas Administrative Code, require a business entity to Complete and print Form 1295, which will include a certification of filing that will contain a unique certification number. The completed Form 1295 with certification of filing must be filed with the governmental body or state agency with which the business entity is entering into the contract.

Form 1295 must be completed online. In Box 3 of the form, provide the solicitation number, contract number or contract name. The form is available from the Texas Ethics Commission by accessing the following web address:

[https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm)

Print your completed Form 1295 showing the Certification Number and Date Filed in the Certification of Filing box at the upper right corner. Sign Form 1295 in front of a notary and submit it with your response to this solicitation.

The following definitions found in the statute and Texas Ethics Commission rules may be helpful in completing Form 1295.

“Business entity” includes an entity through which business is conducted with a governmental entity or state agency, regardless of whether the entity is a for-profit or nonprofit entity. The term does not include a governmental entity or state agency.

“Controlling interest” means: (1) an ownership interest or participating interest in a business entity by virtue of units, percentage, shares, stock, or otherwise that exceeds 10 percent; (2) membership on the board of directors or other governing body of a business entity of which the board or other governing body is composed of not more than 10 members; or (3) service as an officer of a business entity that has four or fewer officers, or service as one of the four officers most highly compensated by a business entity that has more than four officers.

“Interested party” means: (1) a person who has a controlling interest in a business entity with whom a governmental entity or state agency contracts; or (2) a person who actively participates in facilitating the terms of a contract with a governmental entity or state agency, including a broker, intermediary, adviser, or attorney for the business entity.

“Intermediary”, for purposes of this rule, means a person who actively participates in the facilitation of the contract or negotiating the contract, including a broker, adviser, attorney, or representative of or agent for the business entity who:

(1) receives compensation from the business entity for the person’s participation;
(2) communicates directly with the governmental entity or state agency on behalf of the business entity regarding the contract; and
(3) is not an employee of the business entity.
CERTIFICATE OF INTERESTED PARTIES

Complete Nos. 1 - 4 and 6 if there are interested parties. Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

1 Name of business entity filing form, and the city, state and country of the business entity’s place of business.

2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.

3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.

4 | Name of Interested Party | City, State, Country (place of business) | Nature of Interest (check applicable) |
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5 Check only if there is NO Interested Party.

6 UNSWORN DECLARATION

My name is ____________________________________________, and my date of birth is ____________________________.

My address is ____________________________________________, ____________________________________________, ____________________________________________, ____________________________________________.

(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in ____________________________, County, State of ____________________________, on the _______ day of ____________________________, 20_____.

(month) (year)

____________________________________________________
Signature of authorized agent of contracting business entity (Declarat)
# REFERENCE SHEET

**PLEASE TYPE OR ATTACH YOUR REFERENCE LIST HERE:** (Remember to include any educational entities you have done business with)

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