REQUEST FOR PROPOSALS

#34-0217

for

Business Process Automation, Document Management (ECM)
& Customer Relationship Management (CRM) System

RFP Issue Date: 9/23/2013

RFPs Due: 10/30/2013

Contact purchasing@uchastings.edu

UC Hastings Web Address http://www.uchastings.edu/
Purpose:
University of California (UC) Hastings College of the Law is seeking information technology solutions which will enable the College to streamline business processes and communication with internal and external customers and improve its document management. The IT applications will be used primarily by faculty and staff with information obtained from customers - prospective students, registered students, alumni, vendors, budget managers, department heads, employees, the College Board of Directors, donors, and external partner organizations.

UC Hastings employs approximately 600 employees which includes 250 full-time faculty and staff, 100 adjunct faculty, and 250 hourly students and temps. UC Hastings is seeking an Enterprise Content Management (ECM), Customer Relationship Management (CRM), and/or other relevant applications which will provide the best solution to support the College’s business processes, streamline the current processes with online approval workflows, minimize manual activity, and improve reporting and analytics.

About UC Hastings
The College was founded in 1878 as the “law department” of the University of California. UC Hastings is the oldest public law school in California. Founded by Chief Justice Serranus Clinton UC Hastings, the College was established by the California Legislature with its own Board of Directors which has operated the College independently of the Board of Regents of the University of California since its founding. The Board of Regents possesses degree-granting authority, but all other aspects of the College are under the control of the UC Hastings Board of Directors. The College is the only stand-alone, public law school in the nation.

The mission of UC Hastings is to provide an academic program of the highest quality, based upon scholarship, teaching, and research, to a diverse student body and to assure that its graduates have a comprehensive understanding and appreciation of the law and are well trained for the multiplicity of roles that they will play in a society and profession that are subject to continually changing demands and needs.

UC Hastings’ reputation for academic excellence, its formal affiliation with the University of California, and its location in San Francisco’s downtown civic center are major factors contributing to the overall strength of the Institution. This intrinsic quality is reflected in the large number of applications received for a very limited number of seats. Hence, UC Hastings’ enrollment management objectives are to matriculate select students of the highest academic credentials.
Dates

- **RFP Sent:** Monday, September 23, 2013
- **Clarification Requests from Suppliers:** Wednesday, October 9, 2013
- **Responses from UCH:** Friday, October 11, 2013
- **RFPs Due:** Wednesday, October 30, 2013

RFP Scope
The information shall address the Functional-Technical Requirements in the context of the UCH use cases, as provided in the RFP documents.

Guidelines for Submittal

Each firm is to address their expertise in fulfilling the UC Hastings Scope of Work included in this RFP. The proposal shall clearly address all information requested in the attached exhibits. Specifically, your proposal must include the following:

1. Executive Summary
2. Expertise in Enterprise Content Management (ECM), Customer Relationship Management (CRM), and/or relevant technology application
3. Description and benefits of product offerings, solutions and technical features
4. Implementation Expertise
5. Ongoing Support
6. Identification of partners, alliances, subcontractors applicable to UC Hastings request
7. Cost estimate for the system and services
   a. List cost per module
   b. Include estimated cost/rates for customization (if applicable)
   c. Refer to Table 1 for the list of system users

Responses that only minimally address this RFP, or that rely on generic marketing material, will be scored and ranked as such. Responses that deal with the specific UC Hastings item, question, or scenario in using relevant detail will be scored higher.
### Table 1 – System Users List

<table>
<thead>
<tr>
<th>System User Role</th>
<th>Estimated Number</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrator</td>
<td>3</td>
<td>System admin rights</td>
<td>▪ IT system administrator</td>
</tr>
</tbody>
</table>
| Department Administrator| 40               | Creates and manages forms  
Creates and manages processes                                                  | ▪ Department manager                                                   |
| Approver                | 50               | Receives requests  
Reviews requests  
Approves or Denies requests  
May also submit and track requests                                             | ▪ Faculty/Staff member                                                 |
| Requestor               | 1200 (total # of students) to 1800  
(totol # of students + faculty/staff) | Submits requests  
Tracks status of requests                                                | ▪ Student                                                               |
| Guest Approver          | 50               | Receives requests  
Reviews requests  
Approves or Denies requests  
May also submit and track requests                                             | ▪ Non-UC Hastings full time employee (e.g. part time workers)  
▪ Partner from external organizations on special projects (e.g. whitepapers)  
▪ Supervisors of student in Pro Bono, Fellowship or Work Study program |
EVALUATION

- Responses will be read and reviewed by a team composed of UCH staff;
- The team will utilize a combination of numerical (points) and non-numerical factors to score and rank responses;
- Scores and ranks will be combined with cost to determine final rankings and awards.

Due Date
Notify UCH Purchasing & Procurement of your intent to respond by close of business Friday, September 27, 2013.

See page 3 for the RFP schedule.

Clarifications
As part of this RFP process there is a Q&A period. See page 3 for the RFP schedule.

Questions and clarifications concerning this Request for Information should be sent in writing via e-mail to the attention of Darryl Sweet, Director of Business Services at purchasing@uchastings.edu.

Confidentiality
All information concerning all parties referenced herein or their respective businesses and operations, which is directly or indirectly furnished or made available under or by virtue of the existence of this RFP and which is not generally available to the public shall be treated as confidential and proprietary. All parties shall take all reasonable precautions to assure that no such information is used, disclosed, duplicated, or distributed by them or any of their employees or agents for any purpose other than their performance hereunder.

Agreement Term:
No agreement is to be inferred or implied out of this process. Following the evaluation process, UC Hastings will award contract(s) to best meet the needs of the college.

Other Conditions:
Submission of a proposal in response to this RFP does not commit UC Hastings to pay any costs incurred in proposal preparation or submission, or to enter into a contract with any Consultant for any services. UC Hastings may reject any or all responses at UC Hastings’ sole discretion. Failure to comply with all the terms and conditions of this RFP may result in its rejection.

Incorporation of Proposal into Contract
This RFP, the selected firm’s proposal, and all other representations made by the firm, may be incorporated into any and all contract agreements between the firm and UC Hastings.
REQUEST FOR PROPOSALS
ENTERPRISE CONTENT MANAGEMENT
CUSTOMER RELATIONSHIP MANAGEMENT

UC Hastings Contact Information
The primary contacts for this Request for Information process are:

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