


INVITATION TO BID		BID DUE DATE AND TIME	
BOARD OF SUPERVISORS OF LOUISIANA STATE UNIVERSITY AND AGRICULTURAL & MECHANICAL COLLEGE		11/14/2023 11:00 AM CT	
SOLICITATION RFQ-0000002074 SUPPLIER # SUPPLIER NAME AND ADDRESS <div style="border: 1px solid black; height: 80px; width: 100%; margin-top: 10px;"></div>		RETURN BID TO <div style="text-align: center;">lsubids@lsu.edu</div> Buyer Jene Troxclair Ledet Buyer Phone Buyer Email jeneledet@lsu.edu Issue Date 10/23/2023	
TITLE: Software, Conversational Platform			
<p>To Be Completed By Supplier</p> <ol style="list-style-type: none"> _____ "No Bid" (sign and return this page only). _____ My Company does not wish to receive future solicitations for this spend category. Specify your Delivery: To be made within _____ days after receipt of order. If applicable, Supplier's Addendum Acknowledgement/Response: As an authorized agent/signatory of the supplier, I/we acknowledge receipt of this Addendum, and _____ submit no alterations/clarifications to our original bid. _____ submit superseding revisions/clarifications to our original bid as written herein or attached hereto. <p style="text-align: center;">General Instructions to Suppliers</p> <ol style="list-style-type: none"> Sealed bids for furnishing the items and/or services specified are hereby solicited, and will be received by LSU Procurement at the "Return Bid To" address stated above, until the specified due date and time. Read the entire solicitation, including all terms, conditions and specifications. All bid information and prices must be typed or written in ink. Any corrections, erasures or other forms of alteration to unit price are to be initialed by the supplier. Bid prices are to be quoted FOB LSU/Destination and inclusive of any and all applicable shipping and handling charges unless otherwise specified in the solicitation. Any invoiced delivery charges not quoted and itemized on the LSU purchase order are subject to rejection and non-payment. Payment is to be made within 30 days after receipt of properly executed invoice, or delivery and acceptance, whichever is later. By signing this solicitation, the supplier certifies compliance with all general instructions to suppliers, terms, conditions and specifications; and further certifies that this bid is made without collusion or fraud. 			
SUPPLIER NAME		MAILING ADDRESS	
AUTHORIZED SIGNATURE		CITY, STATE ZIP	
PRINTED NAME		PHONE #	
TITLE		FAX #	
E-MAIL		FEDERAL TAX ID #	

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1. Bid Submission Information

All bids must be submitted electronically to LSU Procurement Services. Bids must be received at the "Return Bid To" email address no later than the due date and time specified herein. Bids must be emailed to lsubids@lsu.edu (*This email address should be used for bid submissions only*). Any bids sent directly to the Buyer of record **will not** be forwarded to the "Return Bid To" email.

When submitting electronically, the RFQ number and solicitation title should be listed in the subject line of the email. An original and redacted copy (if applicable) must be submitted electronically. Hard copies of bids will not be accepted; therefore, they will not be evaluated. It is the responsibility of the Supplier to ensure the bid is received by LSU Procurement by the indicated due date and time. Any delays that may occur in transmission of the bid is the responsibility of the supplier. A bid will be considered late if it is not received at the "Return Bid To" email address by the indicated due date and time.

The maximum email attachment size accepted is 125 MB. It is the supplier's responsibility to ensure bid submission is sized such that it is successfully transmitted and received by LSU. If the bid response is too large to be emailed as one document, the bid must be sent as separate documents. Each submittal should be labeled. (Example – Bid Submittal 1 out of 3 for RFQ-00000XXXX - Title; Bid Submittal 2 out of 3 for RFQ-00000XXXX - Title, etc.). If any submittal is received late, LSU will not consider the late submittal(s). Only the submittal(s) received by the due date and time will be considered. Late bids will not be accepted per LAC 34:XIII.515.B.

2. Bid Opening Information

Bid openings are held electronically. There are no in-person bid openings. To electronically attend the bid opening, use the below link to register in advance:

<https://lsu.zoom.us/meeting/register/tJEqcuCrqzMtH930MhK84-K2IANJOT5kKxWp>

After registering, a confirmation email will be provided containing information about joining the bid opening.

No information or opinions concerning the ultimate contract award will be given at bid opening or during the evaluation process.

If an unforeseen circumstance beyond LSU's control prevents bid opening, the Bid will open at the next scheduled bid opening date.

Other Information:

3. A preference, if applicable, may be allowed for products produced, manufactured, assembled, grown or harvested in Louisiana. Do you claim this preference? Yes ____ No _____. Note: Preferences shall not apply to service contracts. Is your Louisiana business workforce composed of a minimum of fifty percent Louisiana residents? Yes ____ No _____. Specify Item Number and location within Louisiana where the product is/was produced, manufactured, assembled, grown or harvested:

_____ Note: This preference is not applicable for services.

4. The continuance of any contract is contingent upon the appropriation of funds to fulfill the requirements of the contract by the legislature. If the legislature fails to appropriate sufficient monies to provide for the continuation of the contract, or if such appropriation is reduced by the veto of the Governor or by any means provided in the appropriations act or Title 39 of the Louisiana Revised Statutes of 1950 to prevent the total appropriation for the year from exceeding revenues for that year, or for any other lawful purpose, and the effect of such reduction is to provide insufficient monies for the continuation of the contract, the contract shall terminate on the date of the beginning of the first fiscal year for which funds are not appropriated.

5. Bid prices are to be quoted FOB LSU/DESTINATION and inclusive of any and all applicable shipping and handling charges.

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These standard terms and conditions shall apply to all LSU solicitations, unless otherwise specifically amended and provided for in the special terms and conditions, specifications, or other solicitation documents. In the event of conflict between the General Instructions to Suppliers or Standard Terms & Conditions and the Special Terms & Conditions, the Special Terms & Conditions shall govern.

Bids submitted are subject to provisions of the laws of the State of Louisiana, including but not limited to: the University Procurement Code (LAC 34:XIII. Chapters 3-25) and the terms, conditions, and specifications stated in this solicitation.

1. Supplier Enrollment

Suppliers providing a bid/quote in response to a LSU solicitation must be setup in the University's new procurement system (Workday) for bid tabbing and award of a purchase order. Suppliers should complete the online supplier registration form prior to submitting a bid response and/or the bid due date and time to ensure bid tabbing can be done timely after the bid deadline. This website is used in place of a paper form and must be accompanied with an IRS Request for Taxpayer Identification Number and Certification form (W-9 or W-8 if foreign) to collect the required business and tax information that support the University's reporting and compliance requirements. To inquire if you or your company is setup or for questions regarding setup, email suppliers@lsu.edu. The supplier enrollment form can be located at: http://www.lsu.edu/administration/ofa/procurement/supplier_registration.php

2. Bid Delivery and Receipt

Bids must be received and time-stamped at the "Return Bid To" address no later than the due date and time specified herein. To assure consideration, your bid must be submitted in a sealed envelope or package and should be clearly and prominently marked with the solicitation number and bid due date, or may be submitted in the special bid return envelope if one was furnished for that purpose.

Supplier are advised that the U.S. Postal Service does not make deliveries to our physical location. USPS mail is delivered to the University's mail center and is redelivered using internal resources. Suppliers may deliver bids by hand or by a courier service to the Procurement Office. The University shall not be responsible for any delays caused by the supplier's chosen means of bid delivery. Supplier is solely responsible for the timely delivery of its bid, and failure to meet the bid due date and time shall result in rejection of the bid. Late bids cannot be accepted per LAC 34:XIII.515.B.

3. Bid Forms

Bids are to be submitted on the LSU solicitation forms provided, and must be signed by an authorized agent of the supplier in accordance with LAC 34:XIII.517. Bids submitted on other forms or in other price formats may be considered informal and may be rejected in part or in its entirety. Bids submitted in pencil and/or bids containing no original signature indicating the supplier's intent to be bound will not be accepted. Bid submissions should not be spiral bound.

4. Interpretation of Solicitation/Supplier Inquiries

If supplier is in doubt as to the meaning of any part or requirement of this solicitation, supplier may submit a written request for interpretation to the Buyer-of-Record at the address and/or fax number shown above. Written inquiries must be received in the Procurement Office no later than 4:30 pm CST four (4) business days prior to the opening of bids, and shall be clearly crossreferenced to the relevant solicitation/specification in question.

No decisions or actions shall be executed by any supplier as a result of oral discussions with any LSU employee or consultant. Any interpretation of the documents will be made by formal addendum only, issued by the Procurement Office, and mailed or delivered to all suppliers known to have received the solicitation. LSU shall not be responsible for any other interpretations or assumptions made by supplier.

5. Bid Addenda

Bid Addendum is to be signed and returned with your bid. If you have already submitted your bid, and this Addendum creates a need to revise/clarify your original response in any way, you are required to submit such in writing. To be considered, your addendum response must be submitted to and received by LSU Procurement at the "Return Bid To" address stated above. Submittals for price alterations and addenda to bids must be clearly marked with the solicitation number and the bid due date/time and returned via fax, email, courier service, hand delivery, or USPS mail. Bid revisions received after bid opening cannot be considered, whereupon the supplier must either honor or withdraw its original bid.

6. Bid Opening

Suppliers may attend the public bid opening of sealed bids. No information or opinions concerning the ultimate contract award will be given at bid opening or during the evaluation process. Written bid tabulations will not be furnished.

7. Special Accommodations

Any "qualified individual with a disability" as defined by the Americans with Disabilities Act, who has submitted a bid and desires to attend the public bid opening, must notify the Procurement Office in writing not later than seven days prior to the bid opening date of their need for special accommodations. If the request cannot be reasonably provided, the individual will be informed prior to the bid opening.

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8. Standards of Quality

Any product or service bid shall conform to all applicable federal, state and local laws and regulations, and the specifications contained in the solicitation. Any manufacturer's name, trade name, brand name, or catalog number used in the specification is for the purpose of describing the standard of quality, performance, and characteristics desired; and is not intended to limit or restrict competition. Supplier must specify the brand and model number of the product offered in his bid. Bids not specifying brand and model number shall be considered as offering the exact product specified in the solicitation.

9. New Products/Warranty/Patents

All products bid for purchase must be new, never previously used, of the manufacturer's current model and/or packaging, and of best quality as measured by acceptable trade standards. No remanufactured, demonstrator, used or irregular products will be considered for purchase unless otherwise specified.

The manufacturer's standard published warranty and provisions shall apply, unless more stringent warranties are otherwise required by LSU and specified in the solicitation. In such cases, the supplier and/or manufacturer shall honor the specified warranty requirements, and bid prices shall include any premium costs of such coverage.

Supplier guarantees that the products proposed and furnished will not infringe upon any valid patent or trademark; and shall, at its own expense, defend any and all actions or suits charging such infringement, and shall save LSU harmless.

10. Descriptive Information

Suppliers proposing an equivalent brand or model are to submit with the bid descriptive information (such as literature, technical data, illustrations, etc) sufficient for LSU to evaluate quality, suitability, and compliance with the specifications. Failure to submit descriptive information may cause bid to be rejected. Any changes made by supplier to a manufacturer's published specifications shall be verifiable by the manufacturer. If items bid do not fully comply with specifications, supplier must state in what respect items deviate. Supplier's failure to note exceptions in its bid will not relieve the supplier from supplying the actual products requested.

11. Bids/Prices/F.O.B. Point

- The bid price for each item is to be quoted on a "net" basis and F.O.B. LSU Destination, i.e. title passing upon receipt and inclusive of all delivery charges, any item discounts, etc.
- Bids other than F.O.B. LSU Destination may be rejected.
- Bids indicating estimated freight charges may be rejected.
- Bids requiring deposits, payment in advance, or C.O.D. terms may be rejected.
- Suppliers who do not quote "net" item prices and who separately quote an overall "lump sum" freight cost or discount for all items shall be considered as submitting an "all-or-none" bid for evaluation and award purposes; and risk rejection if award is made on an item or grouped basis.
- Prices shall be firm for acceptance for a minimum of 30 days, unless otherwise specified. Bids conditioned with shorter acceptance periods may be rejected.
- Prices are to be quoted in the unit/package specified (e.g. each, 12/box, etc), or may be rejected.
- In the event of extension errors, the unit price bid shall prevail.

12. Taxes

Supplier is responsible for including all applicable taxes in the bid price. LSU is exempt from all Louisiana state and local sales and use taxes. By accepting an award, resident and non-resident firms acknowledge their responsibility for the payment of all taxes duly assessed by the State of Louisiana and its political subdivisions for which they are liable, including but not limited to: franchise taxes, privilege taxes, sales taxes, use taxes, ad valorem taxes, etc.

13. Terms and Conditions

This solicitation contains all terms and conditions with respect to the purchase of the goods and/or services specified herein. Submittal of any contrary terms and conditions may cause your bid to be rejected. By signing and submitting a bid, supplier agrees that contrary terms and conditions which may be included in its bid are nullified.

14. Supplier Forms/LSU Signature Authority

The terms and conditions of the LSU solicitation and purchase order/contract shall solely govern the purchase agreement, and shall not be amended by any supplier contract, form, etc.

The University's chief procurement officer, or authorized designee, is delegated sole authority to execute/sign any supplier contracts, forms, etc, on behalf of LSU. Departments are expressly prohibited from signing any supplier forms. Any such supplier contracts/forms bearing unauthorized signatures shall be null and void, shall have no legal force, and shall not be recognized by LSU in any dispute arising therefrom. Suppliers who present any such forms to department users for signature without regard to this strict LSU policy may face contract cancellation, suspension, and/or debarment.

15. Awards

Award will be made to the lowest responsible and responsive supplier. LSU reserves the right: (1) to award items separately, grouped, or on an all-or-none basis, as deemed in its best interest; (2) to reject any or all bids and/or items; and (3) to waive any informalities.

All solicitation specifications, terms and conditions shall be made part of any subsequent award as if fully reproduced and included therein, unless specifically amended in the formal contract.

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16. Acceptance of Bid

Only the issuance of an official LSU purchase order/contract, a Notification of Award letter, or a Notification of Intent to Award letter shall constitute the University's acceptance of a bid. LSU shall not be responsible in any way to a supplier for goods delivered or services rendered without an official purchase order/contract or award letter. Bid tabulations may be requested after acceptance of bid.

17. Applicable Law

All contracts shall be construed in accordance with and governed by the laws of the State of Louisiana.

18. Awarded Products/Unauthorized Substitutions

Only those awarded brands and numbers stated in the LSU contract are approved for delivery, acceptance, and payment purposes. Any substitutions require prior approval of the Procurement Office. Unauthorized product substitutions are subject to rejection at time of delivery, post-return at supplier's expense, and non-payment.

19. Testing/Rejected Goods

Supplier warrants that the products furnished will be in full conformity with the specification, drawing or sample, and agrees that this warranty shall survive delivery, acceptance, and use. Any defect in any product may cause its rejection. LSU reserves the right to test products for conformance to specifications both prior to and after any award. Supplier shall bear the cost of testing if product is found to be non-compliant. All rejected goods will be held at supplier's risk and expense, and subject to supplier's prompt disposition. Unless otherwise arranged, rejected goods will be returned to the supplier freight collect.

20. Delivery

Supplier is responsible for making timely delivery in accordance with its quoted delivery terms. Supplier shall promptly notify the LSU Department and/or Procurement Office of any unforeseen delays beyond its control. In such cases, LSU reserves the right to cancel the order and to make alternative arrangements to meet its needs.

21. Default of Supplier

Failure to deliver within the time specified in the bid/award will constitute a default and may be cause for contract cancellation. Where the University has determined the supplier to be in default, LSU reserves the right to purchase any or all goods or services covered by the contract on the open market and to surcharge the supplier with costs in excess of the contract price. Until such assessed surcharges have been paid, no subsequent bids from the defaulting supplier will be considered for award.

22. Supplier Invoices

Invoices shall reference the LSU purchase order number, supplier's packing list/delivery ticket number, shipping/delivery date, etc. Invoices are to be itemized and billed in accordance with the order, and submitted on the supplier's own invoice form. Invoices submitted by the supplier's third party supplier are not acceptable.

23. Delinquent Payment Penalties

Delinquent payment penalties are mandated and governed by Louisiana R.S. 39:1695. Supplier penalties to the contrary shall be null and void, shall have no legal force, and shall not be recognized by LSU in any dispute arising therefrom.

24. Assignment of Contract/Contract Proceeds

Supplier shall not assign, sublet or transfer its contractual responsibilities, or payment proceeds thereof, to another party without the prior written consent and approval of the Procurement Office. Unauthorized assignments of contract or assignments of contract proceeds shall be null and void, shall have no legal force, and shall not be recognized by LSU in any dispute arising therefrom.

25. Right to Piggyback

Where this solicitation may name one department as the primary contract user, LSU reserves the right to authorize additional departments/campuses to use the contract as their needs arise; and Vendor shall honor all such purchase orders.

26. Contract Cancellation

LSU has the right to cancel any contract for cause, in accordance with procurement rules and regulations, including but not limited to: (1) failure to deliver within the time specified in the contract; (2) failure of the product or service to meet specifications, conform to sample quality or to be delivered in good condition; (3) misrepresentation by the supplier; (4) fraud, collusion, conspiracy or other unlawful means of obtaining any contract with the University; (5) conflict of contract provisions with constitutional or statutory provisions of state or federal law; (6) any other breach of contract. LSU has the right to cancel any contract for convenience at any time by giving thirty (30) days written notice to the supplier. In such cases, the supplier shall be entitled to payment for compliant deliverables in progress.

27. Prohibited Contractual Arrangements

Per Louisiana R.S. 42:1113.A, no public servant, or member of such a public servant's immediate family, or legal entity in which he has a controlling interest shall bid on or enter into any contract, subcontract, or other transaction that is under the supervision or jurisdiction of the agency of such public servant. See statute for complete law, exclusions, and provisions.

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28. Equal Employment Opportunity Compliance

By submitting and signing this bid, supplier agrees to abide by the requirements of the following as applicable: Title VI and VII of the Civil Rights Act of 1964, as amended by the Equal Opportunity Act of 1972; federal Executive Order 11246; federal Rehabilitation Act of 1973, as amended; the Vietnam Era Veteran's Readjustment Assistance Act of 1974; Title IX of the Education Amendments of 1972; the Age Act of 1975; the Americans with Disabilities Act of 1990. Supplier agrees not to discriminate in its employment practices, and will render services under any contract entered into as a result of this solicitation without regard to race, color, religion, sex, age, national origin, veteran status, political affiliation, handicap, disability, or other non-merit factor. Any act of discrimination committed by supplier, or failure to comply with these statutory obligations when applicable, shall be grounds for termination of any contract entered into as a result of this solicitation.

29. Mutual Indemnification

Each party hereto agrees to indemnify, defend, and hold the other, its officers, directors, agents and employees harmless from and against any and all losses, liabilities, and claims, including reasonable attorney's fees arising out of or resulting from the willful act, fault, omission, or negligence of the indemnifying party or of its employees, contractors, or agents in performing its obligations under this agreement, provided however, that neither party hereto shall be liable to the other for any consequential damages arising out of its willful act, fault, omission, or negligence.

30. Certification of No Suspension or Debarment

By signing and submitting this bid, supplier certifies that its company, any subcontractors, or principals thereof, are not suspended or debarred under federal or state laws or regulations. A list of parties who have been suspended or debarred by federal agencies is maintained by the General Services Administration and can be viewed on the internet at www.sam.gov.

31. Right to Audit

The University shall be entitled to audit the books and records of a supplier or any subcontractor under any negotiated contract or subcontract to the extent that such books and records relate to the performance of such contract or subcontract. Such books and records shall be maintained by the supplier for a period of five (5) years from the date of final payment under the prime contract and by the subcontractor for a period of five (5) years from the date of final payment under the subcontract, pursuant to LAC 34:XIII.1603.

32. Diverse Supplier

(a) Supplier understands that LSU, as the state's flagship university, has an interest in providing entrepreneurial opportunities to diversity-owned businesses. The university is dedicated to promoting the growth and development of minority, women, and small and historically underutilized businesses ("Diverse Businesses") by providing opportunities to participate in university contracts.

(b) In support of this commitment, the supplier shall use good faith and best efforts to provide opportunities to Diverse Businesses that are either certified by the state or another certifying agency in a diverse category, as a subcontractor or supplier under this agreement.

(c) If applicable, supplier shall provide LSU with a list of diversity-owned businesses during each contract year, the list of businesses should identify: (1) the name of the business; (2) its principal office or address; (3) the owner(s); and (4) the services or goods that it may provide or supply and the value of the goods or services procured from the businesses included on supplier's list.

(d) To the extent that any federal or state law, rule, or regulation would require that this section be modified or voided, the parties agree that such provision can be amended or severed from the agreement without affecting any of the other terms of the agreement.

33. Data Privacy

By signing and submitting this bid, I hereby authorize that all information provided in this solicitation, including any and all personal or company data may be shared with LSU departments, suppliers and other governmental agencies to facilitate procurement transactions. This data will be retained according to LSU's retention schedule. To learn more about privacy at LSU, please see the [LSU Privacy Statement](#).

BID SPECIFICATIONS
For LSU RFQ-0000002074

The intent of this Invitation to Bid (ITB) is to acquire a single comprehensive, conversational AI lead engagement platform. The solution will allow for a more cost-effective approach to lead nurturing of prospective students and shall integrate across multiple channels (email, chat, SMS). It will provide tools for customized campaigns to target opportunities in the funnel while increasing speed to lead. The solution will provide a robust reporting environment and will integrate with current systems including Salesforce EDA, Salesforce Marketing Cloud and Salesforce Marketing Intelligence.

LSU intends to award for a period not to exceed 5 years. The contract will commence on approximately 1/1/2024 and will be for an initial term of three years. At the option of LSU and acceptance by the Contractor, contract may be renewed for two additional one-year periods at the prices defined in the bid response. Prices shall be firm for all years quoted. Only bidders quoting prices for all years listed on the price sheet will be considered for award. **For award purposes, the low bidder will be determined by the total cost (for years 1-5) for items 1-4.**

The software and services used for processing transactions shall be compliant with standards laws. Supplier agrees to indemnify and hold University, its officers, employees, and agents, harmless for, from and against any and all claims, causes of action, suits, judgments, assessments, costs (including reasonable attorneys' fees) and expenses arising out of or relating to any loss of University including but not limited to the collection, processing, storage, protection and disclosure of personal information, and the applicable privacy policies and agreements of University retained or maintained by Supplier, including but not limited to fraudulent or unapproved use of such credit card or identity information.

Supplier shall implement appropriate measures designed to ensure the confidentiality and security of Protected Information, protect against any anticipated hazards or threats to the integrity or security of such information, protect against unauthorized access or disclosure of information, and prevent any other action that could result in substantial harm to the University, or an individual identified with the data or information in supplier's custody. Such measures shall meet University requirements for data handling.

Supplier agrees that upon termination or end of the contract, it shall return all data to LSU at no additional cost, in a useable electronic form, and erase, destroy, and render unreadable all LSU data in its entirety in a manner that prevents its physical reconstruction through the use of commonly available file restoration utilities, and certify in writing that these actions have been completed within 30 days of the termination of this Agreement or within 7 days of the request of an agent of LSU, whichever shall come first.

Supplier agrees to protect and maintain the security of data with protection security measures that include maintaining secure environments that are patched and up to date with all appropriate security updates as designated by a relevant authority (e.g. Microsoft notifications, etc.). Likewise, Supplier agrees to conform to the following measures to protect and secure data:

a. Data Transmission – Supplier agrees that any and all transmission or exchange of system application data with LSU and/or any other parties shall take place via secure means, e.g. HTTPS, FTPS, SFTP, or equivalent means.

b. Data Storage and Backup – Supplier agrees that any and all LSU data will be stored, processed, and maintained solely on designated servers and that no LSU data at any time will be processed on or transferred to any portable or laptop computing device or any portable storage medium, unless that storage medium is in use as part of the Supplier’s designated backup and recovery processes. All servers, storage, backups, and network paths utilized in the delivery of the service shall be contained within the states, districts, and territories of the United States unless specifically agreed to in writing by an LSU officer with designated data, security, or signature authority. An appropriate officer with the necessary authority can be identified by the LSU Chief Information Security Officer for any general or specific case. Supplier agrees to store all LSU backup data as part of its backup and recovery processes in encrypted form, using 256 bit key.

c. Data Re-use – Supplier agrees that any and all data exchanged shall be used expressly and solely for the purposes of enumerated in the contract. Data shall not be distributed, repurposed or shared across other applications, environments, or business units of Supplier. As required by Federal law, Supplier further agrees that no LSU data of any kind shall be revealed, transmitted, exchanged or otherwise passed to other suppliers or interested parties except on a case-by-case basis as specifically agreed to in writing by an LSU officer with designated data, security, or signature authority.

Supplier shall conduct all services and maintain all data in a manner that is compliant with laws such as FERPA, GDPR, etc.

LSU A&M is committed to ensuring that all implemented digital solutions are accessible to persons with disabilities. To that end, LSU A&M has adopted W3C's Web Content Accessibility Guidelines (WCAG) 2.1, Level AA as the conformity metric. Upon request, suppliers must submit an up-to-date ITIC Voluntary Product Accessibility Template (VPAT) 2.4 Rev WCAG or EDUCAUSE Higher Education Community Vendor Assessment Toolkit (HECVAT) 3.0 indicating the current status of the product/service and the projected timeline towards remediation of any identified deficiencies. LSU reserves the right to reject any bid in which the VPAT doesn't depict a good faith effort of meeting these requirements.

References: Bidders must submit a list of references of companies currently utilizing supplier’s product. The reference list must include at least three companies, one of which must be of similar size and scope as LSU Online and Continuing Education (LSUOCE). Reference information should be provided on the attached reference sheet, and should be submitted with your bid.

Checklist of Supplier’s Capabilities

(Check under the “Yes” or “No” column to indicate if the requirement can be met by your company)

REQUIRED CAPABILITIES – mandatory requirements. These requirements must be available at no additional costs other than the prices quoted on the price sheet:

(Note: Indicating “No” in this section may be cause for rejection of the bid).

Requirement	Yes	No
AI lead conversion platform for lead nurturing of prospective students and shall integrate across multiple channels including email and text.		
Ability to do bidirectional integrations using enterprise tools.		
System quoted shall have the basic ‘off the shelf’ functionalities. However, the University also requires the system to be customizable, flexible, and scalable in order to build workflows for specific business process needs.		
<p>Supplier must be able to deliver the functionalities and services (described below as a-c) by a go-live date of 1/1/2024.</p> <p>LSU OCE has limited technical resources to meet the 1/1/2024 deadline for implementation. If this implementation cannot be achieved via the work of a functional end user, with no technical expertise and with no prior knowledge of the product, you must quote the implementation and training costs (even if implementation is required by a 3rd party partnership) on the implementation and training section of the price sheet (item number 2). All existing capabilities, journeys, and lead nurturing efforts currently in place in current system should be built out and fully functional by 1/1/2024 to avoid any interruption in service. <i>See Attachment A for more information.</i></p> <p>If supplier implementation is required, a comprehensive task list and timeline for implementation must be provided. If implementation can be provided via the work of an LSU OCE functional end user, you must provide a complete list of the number of resources needed along with a task list and timeline for those resources, which details how LSU OCE would implement. The Supplier may enter subcontracts with third parties for the performance of any part of the Supplier’s duties and obligations. In no event shall the existence of a subcontract operate to release or reduce the liability of the Supplier to the University and/or University Department for any breach in the performance of the Supplier’s duties. The Supplier will be the single point of contact for all subcontractor work.</p> <ul style="list-style-type: none"> a) Integration with Salesforce,(CRM of record, Marketing Email Automation Software of record, Marketing Reporting Software of record). b) Ability to support sending through SMTP >10,000 emails per day. c) All existing campaigns, skills, and functionality of current system available by 1/1/2024 (See Attachment A). <p>Can the requirements listed in “a-c” above be implemented via the work of a functional end user, with no technical expertise and with no prior knowledge of the product? If the answer is “no”, the implementation costs & training costs for LSU Online must be quoted on the price sheet (item 2).</p>		

<p>If any of the other listed requirements (other than a-c above) need implementation that cannot be implemented via the work of a functional end user, with no technical expertise and with no prior knowledge of the product, you must quote the implementation costs (even if implementation is required by a 3rd party partnership) for those requirements under the additional implementation cost section of the price sheet (item 3).</p> <p>If supplier implementation is required (for anything other than a-c above) a comprehensive task list and timeline for implementation must be provided. If implementation can be provided via the work of an LSU OCE functional end user, you must provide a complete list of the number of resources needed along with a task list and timeline for those resources, which details how LSU would implement. The Supplier may enter subcontracts with third parties for the performance of any part of the Supplier’s duties and obligations. In no event shall the existence of a subcontract operate to release or reduce the liability of the Supplier to the University and/or University Department for any breach in the performance of the Supplier’s duties. The Supplier will be the single point of contact for all subcontractor work.</p> <p>Can all other listed requirements (other than a-c above) that need implementation be implemented via the work of a functional end user, with no technical expertise and with no prior knowledge of the product? If the answer is “no” then the additional implementation costs must be quoted on the price sheet (item number 3).</p>		
<p>Ability to have one database for LSU OCE with three (3) AI profile instances and with cross selling between each as needed.</p> <ol style="list-style-type: none"> 1. Degree Programs (2) 2. Continuing Education 		
<p>Software centrally hosted in the cloud through the use of a subscription.</p>		
<p>MARKETING</p>		
<p>Support of university brand standards and specs. Must support customized prospect-facing content with marketing-approved colors, graphics, and images. See: https://itservice.lsu.edu/TDCClient/51/OCUR/KB/?CategoryID=99</p>		
<p>User specific website tracking with the ability to identify CRM leads who interact with institutional websites.</p>		
<p>DUPLICATE RECORD MANAGEMENT</p>		
<p>Provide a tool accessible by non-technical users to identify and report potential duplicate records according to rules defined in the system.</p>		
<p>Allow records to be merged or deleted by non-technical users (with appropriate security access) via a graphical user interface.</p>		
<p>OTHER IT SPECS</p>		
<p>Support user ID and password security in a seamless integration with the University’s single-sign-on and authentication mechanisms which may include Shibboleth, Azure Active Directory (OAuth) or a SAML based SSO mechanism (via Shibboleth or AzureAD).</p>		
<p>Allow users and attendees to easily access recruiting details on a mobile device through a mobile enabled interface.</p>		
<p>Be available 24x7x365 with 99.99% uptime.</p>		

<p>LSU requires a train the trainer approach:</p> <ul style="list-style-type: none">• The implementation team would be trained to train other end users. This team would need training to cover an overview of all functionalities as well as the basic skills needed for implementation. <p>All other LSU OCE users would need access to web tutorials overviewing all functionalities.</p>		
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DESIRED CAPABILITIES:

Desired Capability	Yes	No
<p>Provide ongoing customer support representing a partnership with LSU with the following characteristics:</p> <ul style="list-style-type: none"> a) Responsive ticketing / triage system with the ability to escalate. b) Identification of opportunities to improve LSU’s utilization of the System Solution c) Deliver multiple options for reporting and resolving incidents, issues, and questions (e.g., toll-free numbers, online requests, chat, remote dial-in, bulletin boards, on-site support, etc.) d) Continuous understanding of and responsive to university cycles e) Dedicated technical representative & sales and reporting representative to support LSU to measure satisfaction of the services provided and supply metrics to LSU to measure the quality of the products or services supplied 		
<p>Demonstrate a commitment to responsive, subscriber-driven product development. LSU seeks a Supplier that has a demonstrated history of incorporating new features that have been requested by subscribers via user’s group or community forum into the System Solution.</p>		
<p>Ensure business continuity, meet agreed-upon service levels, and provide for disaster recovery by planning for and providing a high-performing, highly available, secure technical infrastructure and by providing staff, tools, methodologies, and processes to proactively monitor and maintain that infrastructure.</p>		

ADDITIONAL QUESTION:

Question	Yes	No
1. Can this tool or subscription service solely provide all the required capabilities listed above.		
2. If the answer to question 1 is “no”, bidder must provide the third-party partner’s name or plug in, a brief description and costs or fees associated with the services on the price sheet (item 4).		

References

Supplier should submit **with bid** the names of at least two (3) companies along with a contact name, address, contact phone number, project description, and the dates of the work performed.

Name of Company: _____

Contact: _____

Email Address: _____

Phone: _____

Name of Company: _____

Contact: _____

Email Address: _____

Phone: _____

Name of Company: _____

Contact: _____

Email Address: _____

Phone: _____

Attachment A

Build out email communication campaigns triggered by lead status and pipeline positions within Salesforce. The messaging cadences must have dynamic and variable responses that should be delivered in 2 hours or less. All activity should be recorded in Salesforce, and reporting should be available in the native platform.

Campaign 1 – Encourage Leads to Drive Action

Audience: Salesforce leads in prospects, attempting, awaiting payment, awaiting submission

Number of emails: minimum of 7

Info: This is the first automated message that would go out to a new lead, that encourages them to drive action.

Campaign 2 – Reengage Leads to Assess Level of Interest

Audience: Salesforce leads in attempting, prospect, awaiting payment & awaiting submission

Number of emails: minimum of 7

Info: This is the second round of automated messages sent to leads to reengage them in our messaging and assess their level of interest.

Campaign 3 - Push Leads Through Pipeline

Audience: Salesforce leads in missing documents, awaiting payment, awaiting submission

Number of emails: minimum of 7

Info: This series of emails is sent to push a lead through the pipeline, encourage them to submit their application and move forward in the online degree process.

Campaign 4 - Win Back Leads Previously Engaged

Audience: Salesforce leads in not scheduled, fallout, accepted, admitted

Number of emails: minimum of 7

Info: The messaging is towards admits that never started. We are targeting admits from our prior terms. We are fetching the students who are admitted for the terms that are from 2020 and prior to the current term and who haven't scheduled yet.