



**REQUEST FOR QUOTE**  
**No. 2024-01**  
**Customer Relationship Management (CRM) System**  
**for Non-Profit Organization**

**Objective:**

ChildCareGroup (CCG) is seeking to procure services from qualified vendors for subscription services for a Customer Relationship Management (CRM) software solution tailored to meet the unique needs of the agency. The selected vendor will provide comprehensive CRM software that enables us to efficiently capture and manage customer relationships, streamline communication processes, and enhance our overall service delivery.

**Scope of Work:**

Key requirements are to include, but may not be limited to, the following:

- User-friendly interface for easy adoption by staff members.
- Customizable features to align with the specific needs of a childcare organization.
- Integration capabilities with existing systems for seamless data flow.
- Robust security measures to protect sensitive information. Submission Guidelines.
- Streamline operations and enhancing communication effectiveness.

**Streamlined Operations:**

- The CRM software must streamline operational processes by optimizing workflow efficiency and reducing manual tasks.
- Automation features should be available to simplify repetitive tasks and improve productivity.
- Integration with other essential systems within the organization to ensure seamless data exchange and eliminate data.

**Effective Communication System:**

- The CRM solution should facilitate effective communication by centralizing customer interactions and correspondence.
- Features such as email templates, automated notifications, and communication tracking are essential to enhance customer engagement.
- Real-time collaboration tools to enable team members to communicate efficiently and work cohesively on customer related tasks.

**\*Please reference Attachment 1 for additional requirements and specifications.**

Responses should include a detailed overview of the CRM software solution offered, and pricing structure. Responses should highlight specific features, case studies demonstrating success in these areas, and any additional tools or services that support improved operational efficiency and communication within a childcare organization.



### **Evaluation Criteria:**

Responses will be evaluated based on the following:

- I. **Organizational Capacity & Expertise (40%)**  
Ability to translate how the Scope of Work can be achieved  
Expertise in Similar Services  
Ability to Specify Services (Technical Needs)
- II. **Previous experience working with non-profit or similar organizations (30%)**  
Evidence of previous/current services provided to non-profit or similar organizations  
A proven track record in building CRM databases, particularly for non-profits  
Previous Experience with the Organization
- III. **Cost (30%)**  
Pricing Structure that is clearly documented, reasonable, and competitive  
Responses to pricing structure to ensure that it aligns with CCG's budget  
Ability to offer comprehensive training on using the CRM system effectively  
Ongoing support and maintenance services

### **Cost of Services:**

Respondents must provide their proposed cost for the entire project through completion. The cost estimate must be comprehensive and should not exceed the quote provided. All fees for additional work not specified in the original scope of work should also be included in the proposal. Any changes to the scope of work must be mutually agreed upon in writing.

### **Terms:**

This agreement shall be for a period of one (1) year with the option to renew for up to four (4) additional one (1) year periods, subject to funding availability.

ChildCareGroup reserves the right to cancel, delay, amend, and/or reissue any part of this Request for Quote (RFQ) at any time without prior notice. This RFQ does not commit CCG to accept any quotes submitted, nor shall CCG be responsible for any costs incurred in the preparation of responses to this RFQ. CCG reserves the right to reject any or all quotes, to accept or reject any or all items in the quotation, to award a contract in whole or in part of the RFQ specifications and requirements, and/or to award to one or multiple bidders herein as deemed to be in the best interest of CCG.

### **Deadline for questions:**

Questions regarding this solicitation will be received until **6:00 pm (Central Time) on March 27, 2024**. All questions shall be forwarded to the attention of the Procurement Department at [procurement@ccgroup.org](mailto:procurement@ccgroup.org). Questions received after this deadline will not be answered.

### **Due Date and Time:**

Responses to this solicitation are due by **6:00 pm (Central Time) on April 4, 2024**. Responses will be received in electronic form **only** and shall be sent to the Procurement Department, at [procurement@ccgroup.org](mailto:procurement@ccgroup.org). Late responses **will not** be accepted.

### General Terms and Conditions:

1. **APPLICABILITY:** These standard terms and conditions apply to all goods or services procured by the CCG, unless otherwise stated in the specifications. The instructions contained herein shall be incorporated into the contract as well as any subsequent purchase order(s) issued for goods or services and shall be included as part of the specifications issued herewith.
2. **ADDENDA:** Any revisions to the information contained herein will be issued in the form of addenda. The sole issuing authority shall be vested in the CCG Procurement Division. If addenda contain material changes to the specifications or pricing form, the Proposer shall acknowledge receipt of addenda in the designated section on the Proposal Certification Form. It is the responsibility of the Proposer to obtain and acknowledge any and all addenda. Failure to acknowledge receipt of addenda may be cause to deem such submission non-responsive.
3. **MINOR DEFECT:** CCG reserves the right to waive any minor defect, irregularity, or informality in any proposal. Minor defects, irregularities or informalities will not affect the end product/performance intended by the specifications. CCG also reserves the right to reject any or all proposals with or without cause prior to award.
4. **TAXES:** CCG is exempt from paying federal excise and transportation taxes and Texas State or local sales and use taxes. Tax shall not be included in the prices offered. A Tax-Exempt Form will be provided by CCG upon request.
5. **CHANGE ORDER:** CCG reserves the right to modify or change plans and specifications as deemed necessary after the performance of the contract has commenced, to decrease or increase the quantity of work to be performed, materials, equipment or supplies to be furnished, or address other provisions of the contract as approved by the CEO and/or CFO, the CCG Board of Trustees, and as appropriate under state law. No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the contract. All change orders or modifications to the contract will be documented in written form by CCG and acknowledged by the contracted proposer. All change orders and modifications to the contract shall be processed through the Procurement Department only.
6. **INVOICES:** Invoices shall be submitted by email to [ap@ccgroup.org](mailto:ap@ccgroup.org), attention Accounts Payable. The Proposer will submit invoices on a monthly basis, including all supporting documentation (if applicable) to CCG, detailing services rendered, the number of hours worked, hourly rate, and total costs incurred.
7. **PAYMENT TERMS:** Payment terms are **Net 30 days**, unless otherwise specified by CCG.
8. **PRICE ESCALATION:** Unless otherwise stated in the Special Provisions or specifications herein, prices must remain firm for the initial term of the contract. The proposer may request an adjustment at the time of contract renewal by submitting a request in written form to the Senior Director of Procurement. CCG reserves the right to approve or reject any and all requests for price escalations.
9. **PRICE REDUCTION:** If during the life of the contract, the proposer's net prices to other customers for the same goods or services are lower than CCG's contracted prices, an equitable adjustment shall be made in the contract price in favor of CCG.

- 10. INDEMNITY:** The proposer agrees to release, defend, indemnify and hold harmless CCG, its officers, agents and employees from and against any and all costs, expenses, suits, demands, claims, liabilities, liens, encumbrances or damages, including attorneys' fees and costs of suit, of any character, name and description, incurred or resulting from any injuries or damages received or sustained by any person, persons or property on account of any intentional wrongful conduct whether intentional or unintentional or any negligent act, omission, or fault of the proposer, or of any agent, employee, authorized representative, subcontractor, or supplier in the execution of, or performance under this contract or any contract.
- 11. TERMINATION FOR DEFAULT:** CCG reserves the right to terminate the contract immediately in the event the proposer fails to meet delivery schedules, or otherwise performs in accordance with the specifications contained herein or in the contract documents. Breach of contract or default authorizes CCG to award the contract to another proposer, or purchase from an alternate source.
- 12. TERMINATION FOR CCG CONVENIENCE:** Whenever CCG, in its discretion, deems it to be in CCG's best interests, it may terminate this contract for CCG's convenience. Such termination shall be effective thirty (30) days after CCG delivers written notice of such termination for convenience to the proposer. Upon receipt of such notice from CCG, proposer shall not thereafter incur, and CCG shall have no liability for, any costs under this contract that are not necessary for actual performance of the contract between the date of the notice of termination for convenience and the effective date of that termination for convenience. In the event of a termination for convenience hereunder, CCG shall have no liability to proposer for lost or anticipated profit resulting therefrom.