Massachusetts Development Finance Agency

Request for Information ("RFI")

Customer Relationship Management Software (CRM)

[April 16, 2018]
1. AGENCY BACKGROUND AND SUMMARY

The Massachusetts Development Finance Agency ("MassDevelopment" or "Agency") is a body politic and corporate created by the Commonwealth of Massachusetts to help foster economic development across the Commonwealth. An 11-member Board of Directors governs the Agency. The Agency provides its clients with entrepreneurial solutions to complex real estate projects and financing options that create economic opportunities in Massachusetts. Our staff is located in several offices throughout the Commonwealth.

2. PROJECT DESCRIPTION

MassDevelopment seeks information from consultants (or other parties) who believe they could advise the Agency on procuring and administering a Customer Relationship Management (CRM) solution to be used Agency wide.

MassDevelopment’s current CRM is used by our Financial Programs Department and our Real Estate Department to track sales of financial products and to manage the status of Real Estate developments. The primary uses are Business Development for tracking new sales opportunities and the Investment Banking, Lending and Community Development departments for following through with the entire sales process. Our sales mainly consist of Bonds, Loans, Guarantees, Community Development Activities and Real Estate Projects and others.

This RFI is issued solely as a means of technical discovery and information gathering. This RFI is for planning purposes only and should not be construed as 1) a solicitation; 2) an obligation on the part of MassDevelopment to make any purchases; or 3) a means to pre-qualify vendors.

MassDevelopment may utilize the results of this RFI in drafting a request for proposals ("RFP") for the CRM Software but is not required to do so. Any future contract that may be awarded must comply with Agency procurement requirements. The Agency will determine whether any actual contracting through a procurement process will occur. Such process could include, but not be limited to, a formal RFP process, using an existing Agency contract(s), or procurement via statewide contract(s).

Not responding to this RFI does not preclude participation in any future RFP, if any, is issued. If a RFP solicitation is released, it will be distributed on the Agency’s website (https://www.massdevelopment.com/rfp-rfq/). It is the responsibility of potential respondents to monitor the website for any future solicitations.

MassDevelopment is subject to the requirements concerning the disclosure of public records under the Massachusetts Public Records law, M.G.L. c. 66, and thus documents and other materials made or received by MassDevelopment may be subject to public disclosure.
3. **RFI REQUIREMENTS PROCESS**

All inquiries concerning this RFI must be addressed to the following person:

Massachusetts Development Finance Agency  
33 Andrews Parkway  
Devens, MA 01434  
Attn: John Ambold  
E-Mail: jambold@massdevelopment.com

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<tbody>
<tr>
<td>RFI issued</td>
<td>4/16/2018</td>
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<tr>
<td>Deadline for questions to MassDevelopment Email to: <a href="mailto:jambold@massdevelopment.com">jambold@massdevelopment.com</a></td>
<td>4/26/2018</td>
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<td>MassDevelopment responses to questions</td>
<td>4/30/2018</td>
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<td>Deadline for receiving responses (all materials)</td>
<td>5/2/2018 by 5:00 PM</td>
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| Responses evaluated. Responders may be invited to present to the Agency (live demonstrations): | Evaluations by 5/10/2018  
Rolling Presentations to the Agency would be scheduled if the Agency feels the Vendor and CRM can provide our requirements |

*MassDevelopment reserves the right to alter the timeline, as it deems necessary.*

This RFI has been distributed electronically using MassDevelopment’s website. It is the responsibility of respondents to check the website for any addenda or modifications to this RFI. All questions should be submitted in writing on or before 4/26/2018 by electronic mail. Answers to all questions of a substantive nature will be posted on MassDevelopment’s website at (https://www.massdevelopment.com/rfp-rfq/). It is the responsibility of respondents to ensure that they receive all information pertaining to this RFI by visiting the website link listed above.

MassDevelopment is not liable for any costs incurred by a respondent in the preparation, submittal, and presentation of their response to this RFI.

4. **RFI REQUIREMENTS**

MassDevelopment is looking for a Customer Relationship Management (CRM) solution that can be used Agency wide as a contact and business management/development tool. The CRM should include:

- Ease of use in that it should be intuitive and easy to understand
- Agile reporting capability
• End users should have the ability to create detailed custom reports
• Workflow capabilities
• Mobile Application
• Outlook interface/plugin
• Robust Marketing Functionality
• Customizable to our business processes

We are currently exploring alternatives to our current CRM software and may issue an RFP after we have reviewed other CRM solutions.

Response Preparation Instructions:

Respondents are asked to provide a response in the following format:

A. Introduction:

   Please provide contact name, phone number, email, business name, address, phone number.

B. Technical Response:

   Each response to this RFI should describe the respondent’s ability to provide the following:

   • Brief written document outlining all CRM services that you can provide
   • Description of equipment and networking requirements for MassDevelopment to run the CRM
   • Description of your CRM’s reporting module
   • Description of your CRM’s marketing module
   • Description of your business development module
   • Any other pertinent information you feel would be important to MassDevelopment
   • Technical requirements (server specifications and/or network requirements)

C. Cost Estimate:

   Respondents are asked to provide estimated costs to help the Agency understand acquisition and on-going costs. Any cost estimates requested are for budgeting purposes only. Responders will not be held to price estimates provided as part of the RFI should the Agency later decide to issue a competitive solicitation (RFP).
5. DISCLOSURE OF INFORMATION AND COMPLIANCE WITH MASSACHUSETTS LAWS

Any party contracting with MassDevelopment pursuant to a further procurement process should be aware of the following MassDevelopment requirements:

a) Respondents are encouraged to utilize qualified minority business enterprises, women business enterprises, veteran business enterprises, and service disabled veteran owned business enterprises (collectively, “Diverse Business Enterprises”). MassDevelopment hereby notifies all respondents that Diverse Business Enterprises will be afforded full opportunity to submit offers and/or proposals in response to this RFI and will not be subjected to discrimination on the basis of race, color, sex, or national origin.

b) Respondents are further advised that upon entering into a contract with MassDevelopment, the respondent must certify that it has complied with any and all laws of the Commonwealth relating to the payment of taxes, reporting of employees and contractors, and withholding and remitting of child support as required by M.G.L. c.62C, §49A, and has either (i) filed all tax returns and paid all taxes required by law; (ii) has filed a pending application for abatement of such taxes; (iii) has a pending petition before the appellate tax board contesting such taxes; or (iv) does not derive taxable income from Massachusetts sources such that it is subject to taxation by the Commonwealth of Massachusetts; and must certify that it is a “Qualified Employer” or an “Exempt Employer” as defined under Chapter 521 of the Massachusetts Acts of 1990, as amended by Chapter 329 of the Massachusetts Acts of 1991, and 102 CMR 12.00 et. seq. as provided in a contract. A respondent’s failure to certify compliance with said laws would be cause for MassDevelopment not to enter into a contract. MassDevelopment further reserves the right to investigate, at any time prior to MassDevelopment’s execution of a contract or during the term of a contract, any information indicating that there has been a failure to comply with said laws. If MassDevelopment determines that any selected respondent has not complied with said laws, it shall decline to enter into a contract, may terminate any contract entered into, and further may decline to extend the contract.

c) This procurement is subject to M.G.L. c. 7 §§ 22C - 22F which provides that a state agency, state authority, the house of representatives or the senate may not procure goods or services from any person employing ten or more employees in an office or other facility located in Northern Ireland, who fails to certify that:

i. he/she does not discriminate in employment, compensation, or terms, conditions and privileges of employment on account of religious or political belief; and

ii. he/she promotes religious tolerance within the work place, and the eradication of any manifestations of religious and other illegal discrimination; and

iii. he/she is not engaged in the manufacture, distribution or sale of firearms, munitions, including rubber or plastic bullets, tear gas, armored vehicles or military aircraft for use or deployment in any activity in Northern Ireland.
Mass. Gen. Laws c. 7, §§22C – 22F shall not apply if (i) the procurement is essential, as determined by MassDevelopment, and compliance would eliminate the only proposal or offer or would result in inadequate competition; or (ii) there is not comparable proposal or offer (i.e. within 10%) by a certifying firm; or (iii) the firm does not employ ten or more employees in an office or other facility located in Northern Ireland.

d) All respondents entering into a contract with MassDevelopment must be registered to do business and be in good standing with the Massachusetts Secretary of State’s Office in order to transact business in Massachusetts. MassDevelopment may request evidence of good standing prior to entering into any contract.

e) A respondent will not be selected for any contract if it appears on any list of debarred or suspended contractors maintained by the Commonwealth or the Federal government.

6. SUMMARY

This is a request for information (RFI) only to identify sources that can provide CRM Services and Support. The information provided in the RFI is subject to change and is not binding on the Agency. The Agency has not made a commitment to procure any of the items discussed, and release of this RFI should not be construed as such a commitment or as authorization to incur cost for which reimbursement would be required or sought. All submissions become Agency property and will not be returned.