

Alumni and Fundraising CRM (ITS1054 AP)

SUMMARY

Start date: 20th March, 2023

End date: 19th March, 2025

OJEU Number: 2022/S 223-642960

Lead Consortium: APUC

Main contact: Michael McLaughlin
mmclaughlin@apuc-scot.ac.uk

Website:
<https://www.hecontracts.co.uk/agreements/1082>

The Alumni and Fundraising CRM System and Associate Services purchased by parties accessing this Framework Agreement will vary in size and complexity. However, in undertaking this Invitation To Tender, the Authority aim to achieve increased service standards, greater consistency and better commercial terms. High objectives include:

- Efficient and effective quality service;
- Value for money;
- Value added service delivery;
- A strong working relationship between Institutions and the appointed Contractor(s)

SCOPE

The purpose of this procurement exercise is to appoint a range of capable best value Contractors for the supply of Alumni and Fundraising Customer Relationship Management Systems and Associated Services.

The scope of this procurement covers the supply of Alumni and Fundraising Customer Relationship Management Systems and Associated Services including but not limited to provision of:

- Timely installation of all required software functionality and upgrades.
- All associated software licensing and or equivalent model of service delivery.
- Support and Maintenance in line with contractual Service Level obligations.
- Managed Hosting Infrastructure, as required by Institutions, scalable to deliver all Service Level obligations.
- Solution Implementation including Data Migration as required by Institutions.
- Project Management of all required Solution Implementations and upgrades as required by Institutions.
- High performance Integration with a range of corporate and specialist education sector Systems.
- Access to relevant institutional data for business intelligence purposes.
- Solution Consultancy wherever required.

Please note that the Institutions may use the Framework Agreement to purchase all or any specific service items listed above in line with their requirements. For example, existing customers of the successful Contractors appointed to the Framework Agreement may simply require renewed Support and Maintenance and or Hosting. Successful Contractors appointed to the Framework Agreement shall provide the Services, upon request, to any new potential customer Institutions and any existing eligible customer Institutions who wish to use the Framework Agreement.

AGREEMENT BENEFITS

The appointed Contractors shall be willing to work with Institutions as partners to facilitate value added benefits and service innovation for both parties.

The System users include all potential Institution staff and fundraising users.

General key benefits that the Institutions aspire to include:

- Functionality to assist the Institutions in maintaining communications with Alumni and to enable fundraising goals to be met.
- Improved staff experience, including back-office staff new starts that need to be swiftly up to speed with the administration of the Alumni and Fundraising Customer Relationship Management Systems.
- Operational and cost efficiencies including reduction in multiple systems and local data sets, eliminating rekeying.
- Clear-data identification, streamlined data flow and improved business intelligence.
- Increased capacity and capability to manage data, quality, ownership and stewardship.
- Reduce the risk associated with interfacing systems by incorporating these into core functionality.
- Reporting functionality
- System integration and extension capabilities
- Added value products and services – Multiple products are available from some suppliers to suit the size and scope of the Institution's requirements
- Simple call off procedures through either ranked Contractors, Desktop Evaluation or Mini Competition
- GDPR is applicable to this Framework Agreement

USING THE FRAMEWORK

Call of is direct by Ranking, Desktop Calculator or by mini-competition.

A suggested Order Form is included in the documentation. Institutions should complete this with every order and may require some consultation with suppliers on adjusted specification, dependancies and roles etc.

It is recommended that institutions review the Data Protection liability cap at the Call Off to suit their own contract and risk. This will ensure that the optimum overall commercial deal will be reached, in terms of financial risk and cost.

SUPPLIERS

Access UK Ltd, Blackbaud Europe Ltd, Ellucian Global Ltd, Infosys Ltd, UC Innovation, Inc,

SUSTAINABILITY

Responsible Procurement

- Virtual meetings reducing carbon emissions through business travel and regular commuting is significantly reduced compared to an office-based supplier
- Minimising the environmental impact of hosting the Online Platform (e.g. Microsoft Azure datacenters / cloud sustainability through liquid immersion cooling, grid-interactive UPS batteries, cleaner fuels for power backup)
- Fair working practices – living wage, flexible working
- Modern slavery & supply chain – zero tolerance policies for forced labour, slavery and human trafficking

Community Benefits Delivery

Community benefits have been offered to APUC members throughout the duration of the Framework Agreement by Ellucian.

- Ellucian's Foundation's (PATH) Scholarship Programme offers funding to Higher Education Institutions in United Kingdom to support students in financial distress. PATH funds help students cover items such as housing, tuition, and food, to allow them to continue pursuing their degree. Institutions may try to progress this through contractual arrangements.

NEXT STEPS