

**THE
UNIVERSITY
OF RHODE ISLAND**

**DIVISION OF
ADMINISTRATION
AND FINANCE**

THINK BIG  WE DO™

PURCHASING DEPARTMENT

10 Tootell Road, Suite 3, Kingston, RI 02881 USA

p: 401.874.2171

f: 401.874.2306

uri.edu/purchasing



DATE: 6/28/19

ADDENDUM #1

BID NO.: 100787
OPENING: 7/15/19 @ 2:00PM
COMMODITY: Membership & Course Enrollment Software

The question period for this RFP ended 6/27/19 @ 12:00PM. No additional questions will be answered. Below are the questions from the vendors and answers provided by the department.

VENDOR A

Q1) Whether companies from Outside USA can apply for this? (like, from India or Canada)

A1) Yes

Q2) Whether we need to come over there for meetings?

A2) Face to face meetings are not required. Meetings, and training are expected to be conducted via telecon, telephone or videocon during our business day on EST.

Q3) Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

A3) Yes, as long as requirements can be met.

Q4) Can we submit the proposals via email?

A4) No, proposals must be submitted as indicated in the solicitation.

VENDOR B

Q1) Would it be possible to receive an electronic copy of RFP 100787 that is searchable? The copy online is of a scanned image and the OCR software messes it up when converting it. This will make the reply/proposal much easier.

A1) Yes, see attached

VENDOR C

Q1) How many users will be accessing the system (not including students or instructors)?

A1) Three full-time staff, in addition to 10-20 volunteers with limited access.

Q2) Will there be a need for any separate web-registration sites other than the main student registration portal?

A2) No. The registration software would be integrated into our website.

Q3) What payment gateway will be used (please be as specific as possible i.e. TouchNet T-Link or TouchNet Gateway instead of merely TouchNet)?

A3) Cashnet emarket

Q4) With what other software will the proposed system need to integrate?

A4) none

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VENDOR D

Q1) What payment gateway is currently used?

A1) Cashnet

A large, stylized handwritten signature in black ink, appearing to read 'RP' with a large loop.

Ryan Pincince
ryanpincince@uri.edu
Assistant Director
Purchasing Department
The University of Rhode Island

Rev. 9-1-15

SECTION 1: INTRODUCTION

The Rhode Island Council on Postsecondary Education/University of Rhode Island is soliciting proposals for cloud based software for the Osher Lifelong Learning Institute (OLLI) from qualified OFFERORS to provide a membership and course enrollment system in accordance with the terms of this Request for Proposal (“RFP”) and the General Terms and Conditions of Purchase indicated in the attached URI Bidder Certification Form.

The initial contract period will begin approximately August 1, 2019 with a go live date of December 1, 2019 for one calendar year. Contracts may be renewed for up to four additional 12-month periods based on vendor performance and the availability of funds.

This is a Request for Proposals, not a Request for Quotes. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to cost; there will be no public opening and reading of responses received by the University of Rhode Island Purchasing Department pursuant to this solicitation, other than to name those offerors who have submitted proposals.

Instructions and Notifications to Offerors

1. Potential offerors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFP are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP may be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP or for providing oral or written clarification of its content shall be borne by the vendor. The University assumes no responsibility for these costs even if the RFP is cancelled or continued.
4. Proposals are considered to be irrevocable for a period of not less than 180 days following the opening date, and may not be withdrawn, except with the express written permission of the University of Rhode Island Purchasing Director.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated in the proposal.
6. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Subcontracts are permitted, provided that their use is clearly indicated in the vendor’s proposal, and the subcontractor(s) to be used is identified in the proposal.
7. The purchase of goods and/or services under an award made pursuant to this RFP will be contingent on the availability of appropriated funds.

8. Vendors are advised that all materials submitted to the University of Rhode Island Purchasing Department for consideration in response to this RFP may be considered to be public records, as defined in R. I. Gen. Laws § 38-2-1, *et seq.*, and may be released for inspection upon request, once an award has been made.

Any information submitted in response to this RFP that a vendor believes are trade secrets or commercial or financial information which is of a privileged or confidential nature should be clearly marked as such. The vendor should provide a brief explanation as to why each portion of information that is marked should be withheld from public disclosure. Vendors are advised that the University of Rhode Island Purchasing Department may release records marked confidential by a vendor upon a public records request if the University determines the marked information does not fall within the category of trade secrets or commercial or financial information which is of a privileged or confidential nature.

9. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
10. By submission of proposals in response to this RFP vendors agree to comply with R. I. General Laws § 28-5.1-10 which mandates that contractors/subcontractors doing business with the State of Rhode Island exercise the same commitment to equal opportunity as prevails under Federal contracts controlled by Federal Executive Orders 11246, 11625 and 11375.

Vendors are required to ensure that they, and any subcontractors awarded a subcontract under this RFP, undertake or continue programs to ensure that minority group members, women, and persons with disabilities are afforded equal employment opportunities without discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability.

Vendors and subcontractors who do more than \$10,000 in government business in one year are prohibited from engaging in employment discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability, and are required to submit an "Affirmative Action Policy Statement."

Vendors with 50 or more employees and \$50,000 or more in government contracts must prepare a written "Affirmative Action Plan" prior to issuance of a purchase order.

- a. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation.
- b. Vendors further agree, where applicable, to complete the "Contract Compliance Report" (<http://odeo.ri.gov/documents/odeo-eeo-contract-compliance-report.pdf>), as well as the "Certificate of Compliance" (<http://odeo.ri.gov/documents/odeo-eeo-certificate-of-compliance.pdf>) and submit both documents, along with their Affirmative Action Plan or an Affirmative Action Policy Statement, prior to issuance of a purchase order. For public works projects vendors and all subcontractors must submit a "Monthly Utilization Report"

(<http://odeo.ri.gov/documents/monthly-employment-utilization-report-form.xlsx>) to the ODEO/State Equal Opportunity Office, which identifies the workforce actually utilized on the project.

For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via e-mail at Krystal.Waters@doa.ri.gov.

11. In accordance with R. I. Gen. Laws § 7-1.2-1401 no foreign corporation has the right to transact business in Rhode Island until it has procured a certificate of authority so to do from the Secretary of State. This is a requirement only of the successful vendor(s). For further information, contact the Secretary of State at (401-222-3040).
12. In accordance with R. I. Gen. Laws §§ 37-14.1-1 and 37-2.2-1 it is the policy of the State to support the fullest possible participation of firms owned and controlled by minorities (MBEs) and women (WBEs) and to support the fullest possible participation of small disadvantaged businesses owned and controlled by persons with disabilities (Disability Business Enterprises a/k/a “DisBE”)(collectively, MBEs, WBEs, and DisBEs are referred to herein as ISBEs) in the performance of State procurements and projects. As part of the evaluation process, vendors will be scored and receive points based upon their proposed ISBE utilization rate in accordance with 150-RICR-90-10-1, “Regulations Governing Participation by Small Business Enterprises in State Purchases of Goods and Services and Public Works Projects”. As a condition of contract award vendors shall agree to meet or exceed their proposed ISBE utilization rate and that the rate shall apply to the total contract price, inclusive of all modifications and amendments. Vendors shall submit their ISBE participation rate on the enclosed form entitled “MBE, WBE and/or DisBE Plan Form”, which shall be submitted in a separate, sealed envelope as part of the proposal. ISBE participation credit will only be granted for ISBEs that are duly certified as MBEs or WBEs by the State of Rhode Island, Department of Administration, Office of Diversity, Equity and Opportunity or firms certified as DisBEs by the Governor’s Commission on Disabilities. The current directory of firms certified as MBEs or WBEs may be accessed at <http://odeo.ri.gov/offices/mbeco/mbe-wbe.php>. Information regarding DisBEs may be accessed at www.gcd.ri.gov.

For further information, visit the Office of Diversity, Equity & Opportunity’s website, at <http://odeo.ri.gov/> and see R.I. Gen. Laws Ch. 37-14.1, R.I. Gen. Laws Ch. 37-2.2, and 150-RICR-90-10-1. The Office of Diversity, Equity & Opportunity may be contacted at, (401) 574-8670 or via email Dorinda.Keene@doa.ri.gov

13. Complete a separate Higher Education Cloud Vendor Assessment Tool.: The Higher Education Cloud Vendor Assessment Tool (HECVAT) may be accessed electronically at <https://security.uri.edu/forms/sig/> and will need to be completed by each vendor. The “HECVAT” is intended to simplify and speed up the process of gathering the information to assess the controls used by your organization to protect the University’s data, comply with the terms of the Agreement and to provide an operationally stable, protected and recoverable service. Your printed completed copy of the HECVAT, provided with your RFP response, will be reviewed and approved for compliance by the

Associate Director of Information Security prior to the Technical Review. HECVATs not approved by the URI Director of Information Security will not proceed to the Technical Review.

Restrictions on Communications – No Bidder-initiated contact, other than normal business activities not associated with this procurement, will be allowed after the issuance of this RFP between Bidders and University employees or their agents regarding this solicitation, except with express permission of the University Purchasing Department. Any such other contact may be considered improper and may disqualify a Bidder from further consideration. The appropriate channel to direct any communications, concerns or questions regarding the RFP is through the email address provided herein.

If a Bidder fails to notify the University of Rhode Island Purchasing Department contact person of an error in this RFP which was known or reasonably should have been known to the Bidder, the Bidder shall submit a response at the Bidder's own risk. If awarded the contract, the Bidder shall not be entitled to additional compensation or performance time by reason of the error or its later correction.

SECTION 2: BACKGROUND

The Osher Lifelong Learning (OLLI) Institute within the University of Rhode Island (URI) is seeking proposals for a robust Web-based computer software system capable of managing all membership, course registrations, course management, and associated financial management, with reporting as needed for the effective control of an operation characterized by constantly changing activity.

The OLLI program at URI is one of approximately 123 OLLI programs at universities and colleges in all 50 states. All OLLI programs are similar in that they involve non-credit, educational programs specifically designed for seasoned adults aged 50 and older; strong support from the leadership of the university or college; a diverse repertoire of intellectually stimulating courses; robust volunteer leadership; established mechanisms for evaluating participant satisfaction with educational offerings; and sound organizational structure. The OLLI program at URI, started in 2009, is a typical OLLI program; it has over 1300 adult members, who select courses of 1-8 days' class sessions. Approximately 95 courses are available in semester formats year round. Most classes take place in a classroom setting at the university, although field trips/bus trips are popular. Faculty consists primarily of adults with a particular expertise or interest who are happy to share their knowledge. A challenge does exist in that the OLLI membership community is not as computer literate / web active as younger groups today; computer skills beyond email may be lacking.

Currently most of the logistics of managing the membership and course registrations, along with payments, is performed on single user spreadsheets; members have on line access to course information and may join or renew, but cannot register for classes. |

SECTION 3: SCOPE OF WORK AND REQUIREMENTS

General Scope of Work

OLLI/URI wishes to acquire/license a multi-user, web-based management system for use by members and staff to execute those routine actions involved in a typical membership based enrollment system, including registration, payment for membership and course fees, plus course management, and reporting capabilities and control programs. The ideal vendor candidate for URI/OLLI will have demonstrated successful implementation of a software program with another Osher Lifelong Learning Program.

Specific Activities / Tasks

1. **System Features – Membership Management:**

- a. Multi user web based access from any web enabled location 24/7 by the general public, and with secure, controlled access by staff for management functions. Ease of access and understanding is imperative for this primarily over 50 adult group.
- b. Information must be securely protected.
- c. System to be compatible with multiple devices including mobile devices.
- d. System needs to have the ability to provide a unique membership ID# for the duration of a member's involvement. This ID# will also connect to their course registration.
- e. The system allows for the members and staff profiles to be customizable.
- f. Ability to assign administrative access based on role.
- g. The system includes preventative functions to avoid the creation of duplicate profiles.
- h. Ability to join or renew using credit card that interfaces with URI payment gateway at no charge. URI has a PCI compliance gateway for credit card processing that performs all credit card related tasks (validity, over credit line, etc.) for a number of organizations within the University, crediting the organization's accounts on payments as well as payment type information. URI /OLLI already uses this gateway for member enrollment, and would like to continue the existing capability but expanded to include class enrollment as well, and in a fashion that permits membership sign-up and class enrollment (for multiple courses) at a single sitting.
- i. Ability of staff to handle point of sale registration to manually register and renew memberships, via credit card, ACH, check payment, credit, scholarship or cash.
- j. Capability of member to edit and maintain their member profile in addition to accessing transaction history, current registrations and wait lists.
- k. Staff to have ability to customize messages for automatic notifications.
- l. Email confirmation of membership upon enrollment
- m. Email renewal notification one month prior to due date.
- n. Email notification of "about to expire"
- o. Email notification ability to all members as needed.
- p. Management reporting on memberships paid within dates selected, "did not renew"
- q. Demographics report on members available.
- r. Ability to peruse catalog/courses as a non-member and check course availability prior to joining.
- s. Ability of member to opt out of emails.
- t. Ability of staff to refund membership registration paid by credit card, or check.

- u. Ability for staff to add member registrations at a free or discounted rate.

2. System Features – Course Descriptions and Management (Office function only)

- a. Integration and/or upload of course proposal form into software for course management. Course selection at URI/OLLI is based on a quality semester catalog that is prepared 2-3 months prior to the semester. The catalog is published in hard copy and mailed to members; concurrently an exact version of the catalog must be available on line. The preferred approach is to have the course narrative/description information entered into the course management component of the system, from which the catalog can be easily printed.
- b. Ability to add / delete / revise course information
- c. Key course information and instructor's profiles can be exported for the creation of a print catalog
- d. Staff can copy a class from a prior offering.

3. System Features – Class enrollment and management

- a. Web access 24/7 to course information with ability to enroll if membership valid, "need to join" message if attempt made w/o membership.
- b. Single point dashboard for staff; navigation on the selections of routine reporting (e.g. class rosters, daily receipts) with selection parameters
- c. Offers advanced search capabilities.
- d. Ability to join as a member and enroll in classes at 1 sitting, including multiple classes. Summarization of charges with one card payment that interfaces with URI payment system
- e. Email confirmation of registrations with reminders prior to class start date. (1 week, 1 day).
- f. Prevention of course registration unless a member. Membership must be valid through duration of course(s) registered for.
- g. Ability, if class is full, to be placed on "**wait list**" status if requested for course with subsequent notification of availability. Up to 24 hours to register.
- h. Faculty / instructor bio. links to courses included with course descriptions
- i. Ability of staff to handle point of sale registration to manually register memberships and courses, via credit card, check payment, OLLI credit, scholarship or cash.
- j. Ability of staff to refund credit card or check registrations.
- k. Ability of staff to offer a credit voucher in lieu of cash refund for payments made by check or cash. Staff to manage voucher use if needed and transfer voucher to another member if requested. Voucher never expires.
- l. Ability to register for non-class type activity – dinners, meetings, or other special events.
- m. Ability of staff to register non-members if needed.
- n. Ability to create and save custom reports within the system for membership – new & renewals, catalog mailing, alumni, parking, course registrations reports, etc....
- o. Ability to export data for evaluation outside the system.
- p. Ability to review members who have been "wait-listed" for selection and notification when space becomes available.
- q. Ability for staff to create a random lottery method for high demand classes.
- r. Has the flexibility to provide students with a course evaluation /feedback. A report will be available to staff with results and summary.

4. Instructor / Classroom management

OLLI faculty members include both members of Olli and non-members, and include trained professionals (teachers, URI faculty) as well as individuals who are comfortable leading a class or preparing a lecture on subjects where they have expertise. Courses are proposed (on any topic) by the potential faculty member in a course proposal format and then approved or rejected by a course evaluation committee. Faculty may be paid a small stipend, or volunteer.

- a. Ability to create a comprehensive information record on faculty members to include name, contact info, email, phone, brief bio and photo option.
- b. System should be able to generate a Faculty ID#, especially for faculty that are not OLLI members.
- c. Faculty history is retained including courses taught, date and data, etc.
- d. Ability of faculty member to email students (within date window) and attach files if needed.
- e. Ability to generate class rosters, make room assignments, class reminders with welcome; class setup parameters

5. Financial reporting

- a. Ability to support financial reporting; Daily/weekly/monthly reporting of receipts by type of payment
- b. Refund capability for credit card and check payments
- c. Ability to support financial auditing requirements with receipts/cancellation data
- d. Ability for staff to save reports.

6. Ongoing Support

- a. Available Unlimited customer support.
- b. Ability for comprehensive training after initial install for new staff or employee refresher.
- c. Live support on opening day of registration for each semester.

7. Conversion/Installation

- a. Upload and pre-populate membership profiles from existing Excel data bank of up to 2000 member and former member records. Plan for converting existing records into initial database, including spreadsheets – methodology.
- b. Project management / management reviews, to consist of weekly status/project reviews between OLLI team leader and vendor project manager and technical review committee as needed, with bi weekly review with OLLI director. Weekly report to be in writing and will address schedule attainment status, and critical issues to be addressed, along with specific assigned tasks.

8. Training

- a. Defined plan to include description of training, recommended schedule, and hours of training included.
- b. Vendor staff to be assigned as well as secondary / backup personnel available.
- c. Defined methodology – use of test files, on line vs in house class
- d. Availability of a test database

- e. Availability of user support
- f. Availability of onsite training.

9. Full Implementation and follow-up

- a. Vendor recommendations on rollout announcements and methodology.
- b. Priority vendor support during this critical period.
- c. Response if problems occur / repositioning.
- d. Awareness of and options to use upgrades to system.
- e. Ability to receive system upgrades free of charge during license period
- f. Availability of system documentation including a data dictionary and description of all the files and their interrelationships

Project Key Components (Critical Success Factors)

- 1. Demonstrating that software package **will meet defined needs** as outlined above.
- 2. A training plan that is acceptable to OLLI management in that it provides minimal impact on ongoing operations. The training should be scheduled at a time when course activity is lower (e.g. between semesters) and when both paid staff and planned volunteers can be available. Training should be scheduled so that rollout can occur in the following semester and must include a fallback plan as well as a partial rollout. A timeline with dates must be established and agreed once award is made for this RFP.
- 3. Unlimited Technical support during introduction/rollout

SECTION 4: PROPOSAL

A. Technical Proposal

Narrative and format: The proposal should address specifically each of the following elements:

- 1. **Staff Qualifications** – Provide staff resumes/CV and describe qualifications and experience of key staff who will be involved in this project. Also, include the number of staff available for support during the business day.
- 2. **Capability, Capacity, and Qualifications of the Offeror** - Please provide a detailed description of the Vendor's experience including other OLLI's (Osher Lifelong Learning Institutes) **A list of relevant client references must be provided, to include client names, addresses, phone numbers, dates of service and type(s) of service(s) provided.**
- 3. **Work Plan** – *(As identified in Section 3, Scope of Work to include but not limited to membership & course management with robust & customized reporting, dashboard, ease of use, online & point of sale registration, wait list & lottery ability, refunds to credit card, or credit voucher, faculty access, catalog creation)*

The work plan description shall include a detailed proposed project schedule (by task and subtask), a list of tasks, activities, and/or milestones that will be employed to administer the project, the assignment of staff members and concentration of effort for each, and the attributable deliverables for each and will identify and describe what type of tutor training methodology will be utilized in the program.

4. **Approach/Methodology** - This section shall describe the offeror's understanding of the University's requirements, including the result(s) intended and desired, the approach and/or methodology to be employed and a detailed work plan for accomplishing the results proposed including training and future upgrades. The description of the approach shall discuss and justify the approach proposed to be taken for each task, and the technical issues that will or maybe confronted at each stage on the project.

B. Cost Proposal

Provide a proposal cost proposal to include the following at a minimum, what the costs will be for five years (one-year contract, renewable up to four additional years. Please include costs for any options for upgrades, ad hoc software enhancement beyond the basic package.). Include cost proposal on completed copy of Attachment A. |

C. ISBE Proposal

See Appendix A for information and the MBE, WBE, and/or Disability Business Enterprise Participation Plan form(s). Bidders are required to complete, sign and submit these forms with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.

SECTION 5: EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee ("TEC") comprised of staff from URI/State Agencies. The TEC first shall consider technical proposals.

Technical proposals must receive a minimum of 60 (85.7%) out of a maximum of 70 points to advance to the cost evaluation phase. Any technical proposals scoring less than 60 points shall not have the accompanying cost or ISBE participation proposals opened and evaluated. The proposal will be dropped from further consideration.

Technical proposals scoring 60 points or higher will have the cost proposals evaluated and assigned up to a maximum of 30 points in cost category bringing the total potential evaluation score to 100 points. After total possible evaluation points are determined ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

The University of Rhode Island reserves the right to select the vendor(s) or firm(s) ("vendor") that it deems to be most qualified to provide the goods and/or services as specified herein; and, conversely, reserves the right to cancel the solicitation in its entirety in its sole discretion.

Proposals shall be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Staff Qualifications	5 Points
Capability, Capacity, and Qualifications of the Offeror Prior experience with other OLLI programs	15 Points
Work Plan	30 Points
Approach Proposed	20 Points
Total Possible Technical Points	70 Points
Cost proposal*	30 Points
Total Possible Evaluation Points	100 Points
ISBE Participation**	6 Bonus Points
Total Possible Points	106 Points

*** Cost Proposal Evaluation:**

The vendor with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other vendors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{vendor's cost proposal}) \times \text{available points}$$

For example: If the vendor with the lowest cost proposal (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly costs and service fees and the total points available are thirty (30), Vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 \times 30 = 19.5$$

****ISBE Participation Evaluation:**

A. Calculation of ISBE Participation Rate

1. ISBE Participation Rate for Non-ISBE Vendors. The ISBE participation rate for non-ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of non-ISBE vendor's total contract price that will be subcontracted to ISBEs by the non-ISBE vendor's total contract price. For example if the non-ISBE's total contract

price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs, the non-ISBE's ISBE participation rate would be 12%.

2. **ISBE Participation Rate for ISBE Vendors.** The ISBE participation rate for ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of the ISBE vendor's total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the ISBE vendor by the ISBE vendor's total contract price. For example if the ISBE vendor's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs and will perform a total of \$8,000.00 of the work itself, the ISBE vendor's ISBE participation rate would be 20%.

B. Points for ISBE Participation Rate:

The vendor with the highest ISBE participation rate shall receive the maximum ISBE participation points. All other vendors shall receive ISBE participation points by applying the following formula:

$$\begin{aligned} & (\text{Vendor's ISBE participation rate} \div \text{Highest ISBE participation rate} \\ & \quad \times \text{Maximum ISBE participation points}) \end{aligned}$$

For example, assuming the weight given by the RFP to ISBE participation is 6 points, if Vendor A has the highest ISBE participation rate at 20% and Vendor B's ISBE participation rate is 12%, Vendor A will receive the maximum 6 points and Vendor B will receive $(12\% \div 20\%) \times 6$ which equals 3.6 points.

General Evaluation:

Points shall be assigned based on the vendor's clear demonstration of the ability to provide the requested goods and/or services. Vendors may be required to submit additional written information or be asked to make an oral presentation before the Technical Review Committee to clarify statements made in the proposal.




SECTION 6: QUESTIONS

Questions concerning this solicitation may be e-mailed to the University of Rhode Island Purchasing Department at URIPurchasing@uri.edu no later than the time and date indicated on page 1 of this solicitation. Please reference the reference **RFP #100787** on all correspondence. Questions should be submitted in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related postings such as addenda. If technical assistance is required, call the Help Desk at (401) 574-8100.

SECTION 7: PROPOSAL CONTENTS

A. Proposals shall include the following:

1. **Bid/Proposal Cover Page**, completed and signed, in ink (first page of RFP document)

2. One completed and signed **URI Bidder Certification Form** (include in the Technical Proposal original copy only). *Do not include in copies of the Technical or Cost proposal.*
3.  **Technical Proposal** - describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The technical proposal is limited to six (6) pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request).
 - a. One (1) Electronic copy on a CD-R, marked “Technical Proposal - Original”.
 - b. One (1) printed paper copy, marked “Technical Proposal -Original” and signed.
 - c. Four (4) printed paper copies
4.  **Cost Proposal** - A separate, signed and sealed cost proposal reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project. *Do not include any copies in the Technical proposals.*
 - a. One (1) Electronic copy on a CD-R, marked “Cost Proposal -Original”.
 - b. One (1) printed paper copy, marked “Cost Proposal -Original” and signed.
 - c. One (1) printed paper copy
5.  **ISBE Proposal** - Two (2) completed original and copy versions, signed and sealed Appendix A. MBE, WBE, and/or Disability Business Enterprise Participation Plan. Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation. *Do not include any copies in the Technical proposals.*
6. **Higher Education Cloud Vendor Assessment Tool (HECVAT)** –
 - a. One (1) Electronic copy on a CD-R, marked “HECVAT”
 - b. One (1) printed paper copy

B. Formatting of proposal response contents should consist of the following:

1. Formatting of CD-Rs – Separate CD-Rs are required for the technical proposal and cost proposal. All CD-Rs submitted must be labeled with:
 - a. Vendor’s name

- b. RFP #
- c. RFP Title
- d. Proposal type (e.g., technical proposal or cost proposal)
- e. If file sizes require more than one CD-R, multiple CD-Rs are acceptable. Each CD-R must include the above labeling and additional labeling of how many CD-Rs should be accounted for (e.g., 3 CD-Rs are submitted for a technical proposal and each CD-R should have additional label of '1 of 3' on first CD-R, '2 of 3' on second CD-R, '3 of 3' on third CD-R).

Vendors are responsible for testing their CD-Rs before submission as the URI Purchasing Department's inability to open or read a CD-R may be grounds for rejection of a Vendor's proposal. All files should be readable and readily accessible on the CD-Rs submitted with no instructions to download files from any external resource(s). If a file is partial, corrupt or unreadable, the URI Purchasing Department may consider it "non-responsive". USB Drives or any other electronic media shall not be accepted. Please note that CD-Rs submitted, shall not be returned.

2. Formatting of written documents and printed copies:

- a. For clarity, the technical proposal shall be typed. These documents shall be single-spaced with 1" margins on white 8.5"x 11" paper using a font of 12 point Calibri or 12 point Times New Roman.
- b. All pages on the technical proposal are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments. The Vendor's name should appear on every page, including attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to.
- c. The cost proposal shall be typed using the formatting provided on the provided template.
- d. Printed copies are to be only bound with removable binder clips.

SECTION 8: PROPOSAL SUBMISSION

Interested vendors must submit proposals to provide the goods and/or services covered by this RFP on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the University of Rhode Island Purchasing Department, shall not be accepted.

Responses should be mailed or hand-delivered in a sealed envelope marked "RFP #100787" to

MAIL TO:

UNIVERSITY OF RHODE ISLAND
PO BOX 1773
PURCHASING DEPARTMENT
KINGSTON, RI 02881

COURIER:

UNIVERSITY OF RHODE ISLAND
PURCHASING DEPARTMENT
10 TOOTELL RD.
KINGSTON, RI 02881-2010

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other University locations or which are otherwise not presented in the URI Purchasing Department by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the URI Purchasing Department will not be considered. The “official” time clock is located in the reception area of the URI Purchasing Department. **(Please be advised that FedEx/UPS do not always arrive by 10:30 am, you would be smart to send your submission to arrive at least one day early)**

SECTION 9: CONCLUDING STATEMENTS

Notwithstanding the above, the University of Rhode Island reserves the right to award on the basis of cost alone, to accept or reject any or all proposals, and to award it in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The University may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award

If a Vendor is selected for an award, no work is to commence until a purchase order is issued by the University of Rhode Island Purchasing Department.

APPENDIX A. PROPOSER ISBE RESPONSIBILITIES AND MBE, WBE, AND/OR DISABILITY BUSINESS ENTERPRISE PARTICIPATION FORM

A. Proposer's ISBE Responsibilities (from 150-RICR-90-10-1.7.E)

1. Proposal of ISBE Participation Rate. Unless otherwise indicated in the RFP, a Proposer must submit its proposed ISBE Participation Rate in a sealed envelope or via sealed electronic submission at the time it submits its proposed total contract price. The Proposer shall be responsible for completing and submitting all standard forms adopted pursuant to 105-RICR-90-10-1.9 and submitting all substantiating documentation as reasonably requested by either the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to the names and contact information of all proposed subcontractors and the dollar amounts that correspond with each proposed subcontract.
2. Failure to Submit ISBE Participation Rate. Any Proposer that fails to submit a proposed ISBE Participation Rate or any requested substantiating documentation in a timely manner shall receive zero (0) ISBE participation points.
3. Execution of Proposed ISBE Participation Rate. Proposers shall be evaluated and scored based on the amounts and rates submitted in their proposals. If awarded the contract, Proposers shall be required to achieve their proposed ISBE Participation Rates. During the life of the contract, the Proposer shall be responsible for submitting all substantiating documentation as reasonably requested by the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to copies of purchase orders, subcontracts, and cancelled checks.
4. Change Orders. If during the life of the contract, a change order is issued by the Division, the Proposer shall notify the ODEO of the change as soon as reasonably possible. Proposers are required to achieve their proposed ISBE Participation Rates on any change order amounts.
5. Notice of Change to Proposed ISBE Participation Rate. If during the life of the contract, the Proposer becomes aware that it will be unable to achieve its proposed ISBE Participation Rate, it must notify the Division and ODEO as soon as reasonably possible. The Division, in consultation with ODEO and Governor's Commission on Disabilities, and the Proposer may agree to a modified ISBE Participation Rate provided that the change in circumstances was beyond the control of the Proposer or the direct result of an unanticipated reduction in the overall total project cost.

B. MBE, WBE, AND/OR Disability Business Enterprise Participation Plan Form:

Attached is the MBE, WBE, and/or Disability Business Enterprise Participation Plan form. Bidders are required to complete, sign and submit with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.



**STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS DEPARTMENT
OF ADMINISTRATION
ONE CAPITOL HILL PROVIDENCE, RHODE ISLAND 02908**

MBE, WBE, and/or DISABILITY BUSINESS ENTERPRISE PARTICIPATION PLAN

Bidder's Name:

Bidder's Address:

Point of Contact:

Telephone:

Email:

Solicitation No.:

Project Name:

This form is intended to capture commitments between the prime contractor/vendor and MBE/WBE and/or Disability Business Enterprise subcontractors and suppliers, including a description of the work to be performed and the percentage of the work as submitted to the prime contractor/vendor. Please note that all MBE/WBE subcontractors/suppliers must be certified by the Office of Diversity, Equity and Opportunity MBE Compliance Office and all Disability Business Enterprises must be certified by the Governor's Commission on Disabilities at time of bid, and that MBE/WBE and Disability Business Enterprise subcontractors must self-perform 100% of the work or subcontract to another RI certified MBE in order to receive participation credit. Vendors may count 60% of expenditures for materials and supplies obtained from an MBE certified as a regular dealer/supplier, and 100% of such expenditures obtained from an MBE certified as a manufacturer. This form must be completed in its entirety and submitted at time of bid. **Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.**

Name of Subcontractor/Supplier:

Type of RI Certification: ☐ MBE ☐ WBE ☐ Disability Business Enterprise

Address:

Point of Contact:

Telephone:

Email:

Detailed Description of Work To Be Performed by Subcontractor or Materials to be Supplied by Supplier:

Total Contract Value (\$):

Subcontract
Value (\$):

ISBE Participation
Rate (%):

Anticipated Date of Performance:

I certify under penalty of perjury that the forgoing statements are true and correct.

Prime Contractor/Vendor Signature

Title

Date

Subcontractor/Supplier Signature

Title

Date

Attachment A – COST PROPOSAL

- | | |
|--|----------------|
| 1. Initial License Procurement (first 12 months) | \$_____ |
| 2. All Labor, Equipment, and Materials necessary to execute
The conversion, implementation, and training for the new
Software as outlined within the RFP specifications. | \$_____ |
| Total | \$_____ |

OPTIONAL

- | | |
|--|---------------------|
| 3. First Year – 12-month extension | \$_____ |
| 4. Second Year – 12-month extension | \$_____ |
| 5. Third Year – 12-month extension | \$_____ |
| 6. Fourth Year – 12-month extension | \$_____ |
| 7. Fifth Year – 12-month extension | \$_____ |
| 8. Phone support cost in excess of License Provisions | \$_____ per hour |
| 9. Training Costs for additional hours after installation (online) | \$_____ per session |
| 10. Training Costs for additional hours after installation (on-site) | \$_____ per session |

Bidder must also submit Price List for upgrades that are made available to all users (or a description of how the price for these upgrades is determined) plus an explanation as to how "Ad Hoc" special software enhancements, beyond the basic package, costs would be determined.