Solicitation Information
March 17, 2015

RFP# 7549418

TITLE: University of Rhode Island - Student Advisement, Scheduling and Early Alert System

Submission Deadline: April 14, 2015 at 2:00 PM (ET)

Questions concerning this solicitation must be received by the Division of Purchases at gail.walsh@purchasing.ri.gov. no later **than Friday, March 27, 2015 at 5:00 PM (ET).** Questions should be submitted in a *Microsoft Word attachment.* Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

GAIL WALSH
CHIEF BUYER

Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov

Note to Applicants:

Offers received without the entire completed three-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

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SECTION 1: INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the University of Rhode Island Academic Affairs, is soliciting proposals from qualified firms for an exclusive partner who will provide the University's Student Advisement Scheduling, Tracking and Early Alert system, in accordance with the terms of this Request for Proposals and the State's General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases Home Page by Internet at www.purchasing.ri.gov. The initial contract period will be 3 years from the date of final contract signing.

This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

1. Potential vendors 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 procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected as being non-responsive.

3. All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the vendor. The State assumes no responsibility for these costs.

4. Proposals are considered to be irrevocable for a period of not less than 120 days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

6. Proposals misdirected to other state locations, or which are otherwise not present in the Division at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the Division.

7. 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. Joint venture and cooperative proposals will not be considered. 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.

8. All proposals should include the vendor's FEIN or Social Security number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.

9. The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.

10. Vendors are advised that all materials submitted to the State for consideration in response to this RFP will be considered to be Public Records as defined in Title 38, Chapter 2 of the General Laws of Rhode Island, without exception, and will be released for inspection immediately upon request once an award has been made.

11. 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.

12. Equal Employment Opportunity (G.L. 1956 § 28-5.1-1, et seq.) – § 28-5.1-1 Declaration of policy – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies to all areas where State dollars are spent, in employment, public services, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Opportunity Office at (401) 222-3090 or Raymond.lambert@doa.ri.gov.

13. In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This is a requirement only of the successful vendor(s).*

14. The vendor should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator at (401) 574-8253 or visit the website www.mbe.ri.gov or contact charles.newton@doa.ri.gov.

15. The State reserves the right to award to one or more offers. The State also reserves the right to award this project based on pricing alone.

SECTION 2: BACKGROUND

The University of Rhode Island (URI) seeks a vendor hosted and supported solution to provide online integrated services for students, advisors, faculty and administrators who will facilitate advisement, appointment scheduling, retention, academic success and early alert programs.

The University currently uses a custom application that is part of its PeopleSoft Student system, called "URI Advisement". This bolt-on module handles day-to-day advising needs such as creating advisor schedules, scheduling group and individual advising appointments, communicating with students via emails and maintaining contact logs.

For early alert and retention services, the University uses a variety of systems. Early alert specialists use a University referral system and MAP-Works to identify students at risk. Intentional outreach to at risk students and just in time interventions are utilized to support student success from admission to graduation

As part of this RFP, the University seeks to streamline and consolidate these functions for students, faculty, advisors and administrators through a central, online, integrated system facilitating communications and functions for advisement, retention and early alert.

SECTION 3: SCOPE OF WORK

General Scope of Work

Note: The term "vendor", "offeror" and "bidder" refer to the company responding to this RFP.

The University of Rhode Island seeks to engage with a vendor to provide online integrated services for students, advisors, faculty and administrators that will facilitate advisement, appointment scheduling, academic success, retention and early alert programs.

The University seeks the following from the vendor and their system:

- A powerful system that will support student success both in and out of the classroom.
- The software solution being presented must be hosted and maintained by the company.
- A streamlined online system for students, advisors and faculty which must be intuitive, accessible, easy-to-manage with up-to-date web-based features.
- Instructors, advisors and administrators must be able to configure the system for scheduling, mapping students to advisors and other required customizable set ups identified within this RFP.
- Must be able to integrate seamlessly with the University's enterprise systems including PeopleSoft, Sakai Learning Management System (LMS) and other systems as needed.
- The system must become the "dashboard" for student performance, achievement and communications, with five critical areas of functionality:
    1. Robust contact notes for faculty and advisors (to create, view and maintain notes related to contacts with advisees).
    2. Ability to integrate data and transactions from PeopleSoft, Sakai and other key University systems both on-site and vendor systems, such as creating class rosters or retrieving performance data.
    3. Map multiple faculty, advisors and users to students, and map students to multiple faculty, advisors, and users.
    4. Automated, customizable email communications from faculty, advisors and administrators to targeted groups of students.
    5. Effective and efficient reporting on aggregate and disaggregated data.

NOTE – As part of the award process, any Bidder meeting minimum Technical Evaluation will be **required** to conduct an in-person, on-campus system demonstration open to the campus community. A final Technical Evaluation will be completed by the Technical Evaluation Committee after viewing in-person, on-campus demonstrations.

Specific Activities / Tasks

- **Must**: These requirements are a must have.
- **Should**: These requirements are also high-priority requirements. However, there might be workarounds that satisfy these requirements or they may not be as time critical.
- **Could**: These desirable requirements are of lesser priority and are ***nice to have*** capabilities in the solution.

The vendor provides the University of Rhode Island the following:

Req. Nbr	Description	(M/S/C)
1.1	Guidance to the University on best practices pertaining to Early Alert, Advisement and Retention practices through the system provided and their network of clients.	M
1.2	A web-based system compatible with web browsers including Firefox, Internet Explorer, Safari, and Chrome.	M
1.3	Single Sign-On or Portal capability with PeopleSoft, and/or Sakai LMS; or pass-through functionality from one of the named systems (URI uses LDAP).	M
1.4	Integration with following systems: PeopleSoft (URI has PeopleSoft Student, Human Resources and Financials), Sakai LMS, MapWorks (outside vendor system), and TutorTrac (outside vendor system).	M
1.5	A completed SIG questionnaire (attached to this RFP as a .zip file) which must be reviewed and approved by the University's Office of Information Security.	M
1.6	A system compatible with Google Apps for Education (specifically Gmail and calendar syncing).	M
1.7	Describe the capability of providing web services or using APIs.	S

NOTE: The vendor is not to change fees or services without the knowledge and written approval of the University of Rhode Island.

A. COMPANY ORGANIZATION & HISTORY

Req. Nbr	Description	(M/S/C)
A.1	Provide a brief overview of your company and history of your organization including any relationship with a parent, subsidiary or affiliated company.	M
A.2	Describe your organizational philosophy/approach to client services.	M
A.3	Provide information regarding your company's financial strength and stability. Detail the composition of your investment portfolio by types of securities (e.g., bonds, mortgages, stocks, etc.).	M
A.4	Provide your most recent ratings for each of the agencies listed below: A.M. Best Standard & Poor's Fitch Moody's	M
A.5	How long has your company been providing and supporting Advisement and Early Alert systems to higher education institutions?	M
A.6	What has made your company a leader in the retention / Early Alert system space?	M
A.7	Please provide three (3) references from your current higher education customers using this system. Please provide only references of United States universities, preferably public research institutions.	M

B. ADVISEMENT FUNCTIONALITY & SCHEDULING

Req. Nbr	Description	(M/S/C)
B.1	Capability for students, faculty and advisors to make, cancel or reschedule appointments online in real-time with other students, faculty and advisors.	M
B.2	Capability for all users to view past, current and future appointments, within assigned security access. For example: a student should be able to view all of their previous and future appointments with anyone they have scheduled within the system; a system administrator should be able to view and report on all appointments in the system.	M
B.3	Capability to provide a daily listing that a receptionist/help desk type role can see and view the appointments for the day – all, or for a specific advisor.	M
B.4	Capability for advisors and faculty to set up blocks of time for group appointments as well as individual (one-on-one) appointments within the system and within the same appointment scheduling area of the system, which will allow a student to select what type of appointment they want and when.	M
B.5	Capability for advisors to view the group appointments and the list of students attending the group appointment.	M
B.6	Capability for advisors and faculty to set up blocks of time for open, drop-in/walk-in office hours, which a student can view within the scheduling system, possibly other areas, to make it clear to students when drop-in hours are available. • Must be able to configure set up to allow appointment locations in multiple physical locations.	M

B.7	Capability to “map” students to advisors by college, major or program. This should be the primary method a student can identify advisement resources for their college, major or program but still have the ability to look-up and schedule time with advisors outside their college, major or program. • This must include: office hours, advising hours, and group advising sessions. • If a student is mapped to a certain advisor by major, students need to be able to view an appointment listing for a major change (ability to see any advisor to discuss change of major). • Also be able to restrict students from seeing certain advisors when needed. For example, freshman and sophomores may be restricted from seeing advisors that can only see juniors and seniors.	M
B.8	Capability to configure and automatically schedule and send emails (or other electronic communication) for appointment reminders, in bulk as well as individual. For example, the system should automatically send appointment reminders to a student 24 hours prior to appointment.	M
B.9	Capability for the system to automatically send confirmation emails to anyone scheduling an appointment with faculty or advisors.	M
B.10	Capability for the system to allow a faculty or advisor to send customized email to all of their advisees at the same time.	M
B.11	Capability for a student to electronically check-in for their appointment through a web-based kiosk in an advising center, or for a faculty/advisor to check the student in on arrival.	M
B.12	Capability to automatically send an email to a student who did not show-up (check-in) to an appointment.	M

B.13	Capability to configure an email template for a variety of topics, with the capability to schedule sending these emails as well as using the template for an individual email.	M
B.14	Capability to enter and retain notes by faculty and advisors pertaining to individual meetings, issues, events or other categories.	M
B.15	Capabilities for faculty and advisors to create, maintain, access, view and print a log of contacts with a student that contains individual and confidential notes from each contact. Capability for administrators, deans and department chairs to run reports on faculty and advisor contact notes.	M
B.16	Capability to update a URI system integrated with the vendor system through automatic or on-demand transactions. • For example, an advisor should be able to update the URI PeopleSoft system through a transaction from within the vendor system to lift a hold identifying a student has met with their advisor and allow the student to enroll in courses. • Vendor should also identify the timing of the automatic transactions: real-time, scheduled batch once-a-day, hourly, etc.	M
B.17	Capability to streamline integration with URI's PeopleSoft system (e-Campus) as well as other URI administrative and academic systems as needed.	M
B.18	Capability for help desk or receptionist to handle student calls to cancel or make appointments for advisors and students.	M
B.19	Capability to integrate with other calendar systems (e.g., Google Calendar).	M

B.20	Student User Interface: ability to view/cancel appointments with mapped advisors.	M
B.21	Advisor / Faculty User Interface: needs to be configured for viewing students, viewing daily appointments, sending emails, maintaining contact logs.	M
B.22	System Administrator Interface: to configure all settings and roles in the advising and appointment scheduling system.	M

C. EARLY ALERT FUNCTIONALITY

Req. Nbr	Description	M/S/C
C.1	Capability to manually raise, update, and close alerts by multiple users/roles such as: faculty, advisor, early alert specialists, etc.	M
C.2	Capability to assess when and by who alerts are raised.	M
C.3	Capability to track the completion of an alert.	M
C.4	Capability to manually or automatically assign alerts.	M
C.5	Capability to set user-defined thresholds for predictive analytics and student groups.	M
C.6	Capability to streamline integration with URI’s PeopleSoft, Sakai (LMS), TutorTrac, and MapWorks and trigger alerts based on these systems.	M
C.7	Capability to configure security and level of access for multiple roles through an individual’s login account. For example, must be a single logon for a user with the ability to control what level of access that user has to a student’s record.	M
C.8	Student User Interface: ability to see only alerts intended for student viewing and view student support offerings including linking to advisor without an additional sign on.	M
C.9	Advisor / Faculty User Interface: needs to be configured for viewing students, viewing alerts (only those that the faculty member entered/raised), raising alerts, sending emails, reporting student contacts (office hours), follow up on alerts, and closing alerts.	M
C.10	System Administrator Interface: to configure the settings and roles in the early alert system.	M
C.11	Capability to maintain and access notes related to an alert according to role-based permissions.	M

C.12	Capability to identify and communicate with students across course sections based on criteria such as course sections, student groups, grades, within an advisor or faculty's group.	M

D. REPORTING FUNCTIONALITY

Req. Nbr	Description	M/S/C
D.1	Describe your reporting services.	M
D.2	Capability to report thresholds based on predictive analytics for student groups.	M
D.3	Capability to report milestones (tasks, events, etc.) by user-defined thresholds for student groups. For example, athletes, by academic major, demographic, etc.	M
D.4	Describe how staff end-users can generate reports without an administrator, specifically their list of students, their list of concerns, and students that match specific user-provided criteria.	M
D.5	Reporting Interface: alert data provided in report form based on the combination of integrated data and early alert data (connect early alert data to retention and graduation, connect early alert data to facts about the student such as students receiving financial aid, colleges, departments, cohorts, survey responses, and other student characteristics).	M
D.6	Capability to track if students are responding to interventions.	S
D.7	Capability to track the effectiveness of the early alert system.	S
D.8	Capability to track and report user activity within vendor system.	M

E. TECHNICAL SUPPORT

Req. Nbr	Description	Notes
E.1	Describe your company's support process (i.e. support tiers, troubleshooting, emergency support, and off-hours support). • Identify what items are covered as part of the overall contract fee and what items are on a transaction basis. • Describe the pricing structure, in detail, of all transaction or fee-based charges. • Is there an online support and user documentation site? • How does URI contact support from the vendor?	
E.2	Describe your organization's commitment to quality technical support.	
E.3	Describe how your company trains and certifies its technical support staff.	
E.4	Describe your support service center, your average performance level and peak workload performance, your hours of operations, hardware used, etc.	
E.5	Describe how you determine a support representative's qualification to provide this service to URI. For example, how do you determine an individual is an expert? How do you ensure continued expertise?	
E.6	Describe any tools your company provides for access to URI data, including usage and/or service Analytics.	
E.7	Describe how data are secured within the respective systems. What types of information security policies are in place regarding data during communications and while stored within your systems? How is your stored data secured?	
E.8	Provide the procedures you follow for security audit for your systems, monitoring, threat assessments and resolution plans for both physical security in your data center and staff offices as well as software, data and web security.	

E.9	Can URI staff contact your support systems by telephone? If so, what are the staffing hours and levels of service available outside of business hours?	
E.10	Describe the systems and procedures in place for ensuring stable, consistent availability of your system for URI and optimal system performance, including: • What type of system performance monitoring is in place? • Do you provide regular system performance reporting to your clients? If so, please describe and provide a sample. • Do you have server fail-over capabilities? If so, please describe, including how fail-over is triggered. • What is the procedure for URI to report performance issues? What is the guaranteed response and resolution time? Is this part of the Service Level Agreement? Please add any additional information you feel we should know regarding the details of the type of service you provide to ensure the best possible performance for your system.	
E.11	The University requires a completed SIG questionnaire (attached to this RFP) which must be reviewed and approved by the University's Office of Information Security.	
E.12	Capability to provide secure information between end user and technology infrastructure (encryption, authentication, SSL, etc.).	
E.13	Vendor must be Business Continuity compliant (infrastructure redundancy, backup and recovery, disaster recovery capabilities). Please provide a copy of your disaster recovery plan.	

E.14	Describe the data and system structures. Does the University's data cohabitate in separate systems, separate VMs, separate database?	
E.15	Describe the capability of providing training technical and end-user documentation.	

F. CLIENT SERVICE / QUALITY ASSURANCE

Req. Nbr	Description	Notes
F.1	Describe the support and training you will provide URI: faculty, administrators, technical staff, academic leadership and other URI personnel, in the following areas: • In-person training • Online training and resources	
F.3	Describe your procedures for monitoring client satisfaction end-user (students, faculty, and staff) satisfaction.	
F.4	Describe your client service standards.	

G. RECORD KEEPING / ADMINISTRATION / REPORTING

Req. Nbr	Description	Notes
G.1	List the people who would be responsible for overseeing our account, their responsibilities and their experience.	
G.2	What systems do you provide for URI staff to manage their account with you? Describe the tools, procedures and process.	
G.3	Describe in detail the University's reporting requirements to you, including timeframes. In particular, describe the contract and payment process.	
G.4	Describe the standard reporting package that you would furnish URI (provide samples).	
G.5	What services, procedures or process will your company offer to URI if your company is acquired or ceases providing system services? How will URI be notified and what is the notice timeline to be provided to the University?	

H. SYSTEM MIGRATION & IMPLEMENTATION

Req. Nbr	Description	Notes
H.1	Provide a proposed implementation schedule and description of the process should your firm be awarded the contract. Indicate what the responsibilities of the employer would be in this process.	
H.2	A proposed detailed Migration Project Plan for migrating to the system. This plan must also identify: • Decision points and areas of responsibility. A detailed and final plan will be developed after contract signing with the selected vendor. • How long will the implementation process take? • What is your proposed Transition Plan from the existing URI Advisement system to yours?	
H.3	What are your change management procedures, policies, and plans for managing upgrades, maintenance, testing and client impacts? • What is your policy for providing continuous service during planned system changes?	
H.4	Describe your data back-up and retention policies. • Is your backup data encrypted? • What is your disaster recovery plan? • How often do you test your recovery system?	
H.5	Describe your success in integrating with PeopleSoft. • Include references from higher education institutions using PeopleSoft with whom you are currently providing similar services.	

I. REGULATORY SERVICES

Req. Nbr	Description	Notes
I.1	What fiduciary responsibility does your organization assume for this project?	
I.2	How do you ensure that your record-keeping system is in compliance with all regulations?	
I.3	Who is your compliance officer/consultant or legal counsel?	

J. QUESTIONS FOR THE BIDDER

Req. Nbr	Description	Notes
J.1	What is your data retention policy? How many years' worth of data will URI be able to access? Is there any concept of a "snapshot" of data from a previous time period? Or is data current and real-time only?	
J.2	Do you offer automated survey functionality to gather feedback from faculty? Describe the process for creating, deploying, submitting, and reviewing faculty surveys.	
J.3	Can the solution provide institution-defined intake questionnaires about a student (e.g. academic goals, career goals, number of children, job status, etc.)?	

K. PRICING

Describe your pricing structure for all services, in detail. Include all costs assessed to URI including:

Req. Nbr	Description	Notes
K.1	Data Migration and conversion fees	
K.2	Implementation fees	
K.3	Annual Maintenance fees	
K.4	Customization fees	
K.5	Other applicable fees	
K.6	Multi-year discounts	

L. MISCELLANEOUS

Provide any additional information you feel may be relevant to your proposal.

SECTION 4: TECHNICAL PROPOSAL

Narrative and format: The separate technical proposal should address specifically each of the required elements:

1. Executive Summary – The executive summary is intended to highlight the contents of the Technical Proposal and to provide evaluators with a broad understanding of the offeror's technical approach and ability.

2. Capability, Capacity, and Qualifications of the Offeror –This section shall include identification of all staff and/or subcontractors proposed as members of the project team, and the duties, responsibilities and concentration of effort which apply to each (as well as resumes, curricula vitae or statements of prior experience and qualification).

3. Work Plan/Approach Proposed –This section shall describe the offeror's understanding of the State/University's requirement, including the result(s) intended and desired, 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. 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. Previous Experience and Background, including the following information:

   i. A comprehensive listing of similar service engagements with other universities of comparable size, including a brief description of the service provided and for how long;
   ii. A description of the business background of the offeror (and all subcontractors proposed), including a description of their financial position.

SECTION 5: COST PROPOSAL

A separate, signed and sealed, Cost Proposal reflecting the fee structure proposed for this scope of service as defined in Section 3 - K of RFP requirements.

SECTION 6: PROPOSAL SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at gail.walsh@purchasing.ri.gov no later than the date and time indicated on page one of this solicitation. Please reference **RFP # 7549418** on all correspondence. Questions should be submitted in a Microsoft Word attachment. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. If technical assistance is required to download, call the Help Desk at (401) 222-3766 or lynda.moore@doit.ri.gov.

Offerors are encouraged to submit written questions to the Division of Purchases. **No other contact with State parties will be permitted**. Interested offerors may submit proposals to provide the services covered by this Request 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 Division of Purchases will not be considered.

Responses **(an original plus six (6) copies)** should be mailed or hand-delivered in a sealed envelope marked "**RFP# 7549418 URI – STUDENT ADVISEMENT, SCHEDULING & EARLY ALERT SYSTEM**" to:

RI Dept. of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the Division of Purchases will not be considered. The official time clock is in the reception area of the Division of Purchases.

RESPONSE CONTENTS

Responses shall include the following:

1. A completed and signed three-page R.I.V.I.P generated bidder certification cover sheet downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov.

2. A completed and signed W-9 downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov. **Please include with original proposal only.**

3. **A separate Technical Proposal** answering **all items listed in Section 3**, including the attached SIG Questionnaire. **SIG Questionnaire is attached as a .zip file.**

4. **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 as defined in **Section 3 - K** of RFP requirements.

In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in **electronic format** (**CD-ROM, disc, or flash drive**). Microsoft Word / Excel OR PDF format is preferable. Two electronic copies are requested (One for the State and one for the University) and it should be placed in the proposal marked “original”.

Clarification: Two (2) electronic copies of Technical Proposal and
Two (2) electronic copies of Cost Proposal

<u>Please do not combine technical and cost proposal on electronic copies.</u>

SECTION 7: EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee comprised of staff from state agencies. To advance to the Cost Evaluation phase, the Technical Proposal must receive a minimum of 60 (85.7%) out of a maximum of 70 technical points. Any technical proposals scoring less than 60 points will not have the cost component opened and evaluated. The proposal will be dropped from further consideration.

NOTE – As part of the award process, any Bidder meeting minimum Technical Evaluation points will be **required** to conduct an in-person, on-campus system demonstration open to the campus community. The Technical Evaluation Committee will complete a final Technical Evaluation after viewing in-person, on-campus demonstrations.

Proposals scoring 60 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in cost category, bringing the potential maximum score to 100 points.

The University of Rhode Island reserves the exclusive right to select the individual(s) or firm (vendor) that it deems to be in its best interest to accomplish the project as specified herein; and conversely, reserves the right not to fund any proposal(s).

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

Criteria	Possible Points
Company, History and References • Section 3 - A, I	10
Providing Required Functionality • Section 3 - B, C, D, J	25
Support Plan & Services • Section 3 - E, F, G	20
Implementation • Section 3 - H	15
Total Possible Technical Points	**70 Points**
Cost calculated as lowest responsive cost proposal divided by (this cost proposal) times 30 points *	30 Points
Total Possible Points	**100 Points**

*The Low bidder will receive one hundred percent (100%) of the available points for cost. All other bidders will be awarded cost points based upon the following formula:

(low bid / vendors bid) * available points

For example: If the low bidder (Vendor A) bids $65,000 and Vendor B bids $100,000 for monthly cost and service fee and the total points available are Thirty (30), vendor B's cost points are calculated as follows:

$65,000 / $100,000 * 30 = 19.5

Points will be assigned based on the offeror's clear demonstration of his/her abilities to complete the work, apply appropriate methods to complete the work, create innovative solutions and quality of past performance in similar projects.

Applicants 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 their proposal.

CONCLUDING STATEMENTS

Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all proposals, and to award 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 State may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

The State's General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded to the RFP. The State's General Conditions of Purchases/General Terms and Conditions can be found at the following URL: https://www.purchasing.ri.gov/RIVIP/publicdocuments/ATTA.pdf