Request for Proposals

For

Issued by:
Pennsylvania State System of Higher Education
Office of the Chancellor

RFP # 2011-OOC-KDA-00

Issue Date: Month, Day, 2011
Response Date: Month, Day, 2011
# Table of Contents

<table>
<thead>
<tr>
<th>Part</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part I</td>
<td>General Information</td>
<td>3</td>
</tr>
<tr>
<td>Part II</td>
<td>Description of the Organization</td>
<td>8</td>
</tr>
<tr>
<td>Part III</td>
<td>Work Statement</td>
<td>9</td>
</tr>
<tr>
<td>Part IV</td>
<td>Information Required From Suppliers</td>
<td>10</td>
</tr>
<tr>
<td>Part V</td>
<td>Criteria for Selection</td>
<td>13</td>
</tr>
<tr>
<td>Appendix A</td>
<td>Technical Proposal Form</td>
<td></td>
</tr>
<tr>
<td>Appendix B</td>
<td>Cost Proposal Form</td>
<td></td>
</tr>
</tbody>
</table>
Pennsylvania State System of Higher Education
Office of the Chancellor
RFP #2011-00C-KDA-00

Section I
General Information

I-1 Purpose
This Request for Proposals (RFP) provides interested service providers/suppliers with sufficient information to prepare and submit proposals for consideration by the Pennsylvania State System of Higher Education (PASSHE) to provide (describe solicitation).

I-2 Issuing Office
This RFP is being issued for PASSHE by the issuing office listed below. The issuing office is the sole point of contact for this RFP. Please refer all inquiries to:

Ms. Kimberly Auchenbach
Director, Strategic Sourcing
Pennsylvania State System of Higher Education
Office of the Chancellor
Dixon University Center
2986 North Second Street
Harrisburg, PA 17110
V: 717-720-4155; F: 717-720-4111
Email: kauchenbach@passhe.edu
Web site: www.passhe.edu

Utilizing the eProcurement Exchange (reference section IV-8), suppliers must express their intent to attend the pre-bid conference and subsequently submit a proposal by Month, Day, 2011, 3PM EST. Any RFP addendums/updates will be sent directly to the contact person and will also be located at PASSHE’s eProcurement Exchange. If a supplier does not have the capability to use this eProcurement tool, please notify the issuing office.

Note that only information supplied by the issuing office, including responses to questions regarding the RFP, should be used in preparing Supplier proposals. Any and all other contacts or information received regarding the subject prior to the release of this RFP should be disregarded in preparing responses.

From the issue date of this RFP until a determination is made regarding the selection of a supplier, all contacts concerning this RFP must be made through the issuing office. Any violation of this condition is cause for PASSHE to reject a supplier’s proposal. If it is later discovered that any violations have occurred, PASSHE may reject any proposal.

Pertinent Dates:

- Pre-bid conference: Day of the Week, Month, Day, 2011 from Time EST
- Questions accepted up through: Day of the Week, Month, Day, 2011, 3:00PM EST
- Responses to questions posted; as received, final responses posted by Day of the Week, Month, Day, 2011
- Submission Deadline: Day of the Week, Month, Day, 2011, 3:00PM EST
I-3  **Scope**
This RFP contains instructions governing the responses to be submitted and the material to be included therein, a description of the services to be provided, requirements which must be met to be eligible for consideration, and contract terms and conditions.

I-4  **Pre-Proposal Conference**
A pre-proposal conference will be held on [Day of the Week, Month, Day, 2011 from Time EST 2011](http://www.dixonuniversitycenter.org/directions.asp) at the Dixon University Center. Directions and parking instructions can be found at: http://www.dixonuniversitycenter.org/directions.asp

All Suppliers are to check in at the security desk of the Administration and Finance Building where instructions to the meeting room will be provided. The purpose of this conference is to clarify any points in the RFP, which may not have been clearly understood. Questions must be forwarded to the issuing office prior to the meeting to ensure sufficient analysis can be made before an answer is supplied. In view of the limited facilities available for the conference, it is requested representation be limited to two individuals per Supplier. The pre-proposal conference is for information only. Answers furnished during the conference will not be official until verified, in writing, by the issuing office. **Attendance is mandatory. If a supplier has a justifiable reason why they cannot attend in person, arrangements may be made to phone in to the conference but only if approved by the issuing office in advance. Suppliers must register on the e-Procurement site to confirm their attendance.**

OR

There is no pre-proposal conference currently scheduled.

I-5  **Rejection of Proposals**
PASSHE reserves the right to reject any and all responses received from suppliers as a result of this RFP and to cancel this solicitation at any time prior to the execution of any contract.

I-6  **Contract**
It is proposed that, if a contract is entered into as a result of successful negotiations, the selected supplier will be required to sign a standard Commonwealth of Pennsylvania contract. This agreement will contain the provisions shown as the Service Purchase Contract Terms and Conditions found on the PASSHE website at the following location: http://www.passhe.edu/partners/Pages/Solicitation-Supplemental-Information.aspx

Proposal/contract negotiations may be undertaken with suppliers whose proposals show them to be qualified, responsible, and capable of performing the work. The “Work Statement,” as negotiated, will be incorporated into the standard contract.

Contract terms and conditions are negotiated upon issuance of intent to award to the supplier. However, some of the terms are not negotiable as they are required to do business with the Commonwealth. Prohibited contract clauses include assignment clauses, law of the contract, attorney’s fees, court costs, entry of judgment, indemnity and hold-harmless clauses, arbitration clauses, payment in advance and payment of insurance. Specific contract clauses in the following sections are not negotiable. Section 3: Compliance with Law, Section 13: Assignment of Antitrust Claims, Section 14: Hold Harmless Provision, Section 20: Assignability and Subcontracting, and Section 27: Applicable Law.
The supplier will be deemed to have accepted the standard terms and conditions, except as are expressly called out in the supplier's proposal. If exceptions are taken, the supplier must submit a “redlined” version of the term or condition showing all modifications proposed by the supplier. The supplier must provide an explanation as to why the modification is required. The supplier’s willingness to accept the Master Agreement Terms and Conditions, with minor clarifications, shall be an affirmative factor in the evaluation of the supplier’s proposal. Suppliers must submit any exceptions to the Commonwealth of Pennsylvania contract in their response and include any contracts, orders forms, and terms/conditions for which the Supplier requires signature.

I-7 Incurring Costs
PASSHE is not liable for any costs or expenses incurred by suppliers in the preparation or submission of their proposals or for attendance at any conferences or meetings related to this RFP.

I-8 Supplier Responsibilities
Suppliers will be expected to register at PASSHE’s eProcurement Exchange in order to submit proposals. That individual will be the sole point of contact with regard to contractual matters.

I-9 Prime Supplier/Subcontracting
Eligible Suppliers will be considered prime suppliers with respect to any supplies/work they are awarded. Any use of subcontractors must be approved in writing by PASSHE. Prime suppliers are encouraged to solicit quotes from Minority and Women-Owned Business Enterprises when requiring subcontractors.

I-10 Economy of Preparation
Proposals should be prepared simply and economically, providing a straightforward, concise description of the supplier’s ability to meet the requirements of this RFP.

I-11 Disclosure of Proposal Contents
Suppliers’ proposals will become part of the contract award resulting from this RFP and are not, therefore, confidential. PASSHE has the right to use any other concepts presented in any reply to this RFP. Selection or rejection of a proposal does not affect this right.

Please be advised that effective January 1, 2009, all responses to this procurement opportunity are subject to Pennsylvania Right-to-Know Law, 65 P.S. §67.101 et seq., (Act 3 of 2008). Refer to Section I-20.

I-12 Addenda to the RFP
If it becomes necessary to revise any part of this RFP, addenda will be posted at PASSHE’s eProcurement Exchange.

The information contained on this web site is current and accurate. It is the Supplier’s responsibility to check this site periodically to obtain any changes to the solicitation. Suppliers must acknowledge all addenda in their proposal response. Suppliers who fail to submit current copies of the solicitation may be deemed non-responsive. Suppliers who do not have access to the Internet should notify the issuing office.
Debriefing Conference
Suppliers whose proposals are not selected will be notified of the name of the selected supplier and will be given the opportunity to be debriefed. The purpose of the debriefing is not to compare proposals, but to provide information that may assist individual suppliers in preparing future proposals. The issuing office will schedule the date, time, and location of all debriefing conferences.

News Releases
News releases pertaining to this RFP may not be made without PASSHE’S approval, and then only in coordination with the issuing office.

Response Date
To be considered, proposals must be received at the issuing office on or before Day of the Week, Month, Day, 2011, 3:00PM EST. Late submissions will not be accepted.

Proposals
To be considered, proposals must consist of a complete response using the format provided in Part IV of this RFP. Proposals must be submitted utilizing the eProcurement Exchange (reference section IV-8). If a supplier does not have the capability to use this eProcurement tool, please notify the issuing office. Proposals must consist of a complete response to the requirements outlined herein and shall be submitted to the issuing office no later than the submission date and time. No other distribution of proposals will be made by the supplier. Proposal contents will become contractual obligations if and when a contract is executed. For this RFP, the proposal, as submitted, must remain valid during the entire solicitation, award, and contract finalization process.

Cost Data
All cost data for the proposal shall be submitted in a separate document. Absolutely no pricing can appear anywhere in the technical proposal including technical proposal appendices or the supplier will be disqualified. Failure to meet this requirement will result in automatic disqualification of the proposal.

On-Site Presentation
Suppliers who meet the initial qualification criteria may be required to make an onsite presentation. The outline for the material to be covered in the presentation will be provided to suppliers approximately one-two weeks in advance of the presentation date. All suppliers will be given the same outline to ensure the presentations are consistent. All presentations will be held at the same location and each supplier shall be allowed the same amount of time for their presentation. All costs associated by such presentations will be borne by the supplier. Promotional items shall not be provided at these presentations.

Supplier Responsibility Program
Suppliers must certify that they are not currently under suspension or debarment by the Commonwealth of Pennsylvania, any other state, or the federal government to the best to their knowledge. Additionally, service providers must certify that they are not tax delinquent with either the Pennsylvania Department of Revenue or the Pennsylvania Department of Labor and Industry to the best of their knowledge. Service providers must acknowledge that, if they are currently under suspension or debarment, or if they owe delinquent taxes, their proposal may not be accepted or considered. Suppliers will certify to all of the above upon submittal of their proposal.
I-20 **Open Records**

Please be advised that effective January 1, 2009 all responses to this procurement opportunity are subject to the Pennsylvania Right-to-Know Law, 65 P.S. §67.101 et seq., (Act 3 of 2008). The Right-to-Know Law permits any requestor to inspect and/or copy any record prepared and maintained or received in the course of the operation of a public office or agency that is not subject to the enumerated exceptions under the law. **If your response to the procurement opportunity contains a trade secret or confidential proprietary information, you should include with your response a separate signed written statement to that effect.** Should your response become the subject of a Pennsylvania Right-to-Know Law request, you will be notified by the procurement office to identify all trade secrets or confidential and proprietary information that is included in your response. The agency will then determine whether the claimed trade secret or confidential and proprietary information is subject to disclosure.

I-21 **Type of Contract**

Any contract entered into as a result of this RFP by the issuing office is eligible for use by all of the universities that are a part of the Pennsylvania State System of Higher Education (“PASSHE”) and any other Commonwealth of Pennsylvania Agency, and the interested Supplier agrees to supply the goods/services to those universities and those agencies on the same terms and conditions. To the extent that other universities or Commonwealth Agencies procure from this order/contract, they assume the liability for payment to the successful Supplier. Contract will be issued for a 5 year term with the potential to add two additional one year renewals for a total contract period of 7 years.

PASSHE reserves the right to:

1. Not award a contract
2. Award a single contract for all services
3. Issue multiple awards

Contract negotiations will be pursued with a subset of compliant respondents whose proposals best meet financial, contractual, and technical and support requirements for PASSHE.

This RFP shall not result in an exclusive rights contract. The right of multi-university use of any contract resulting from this RFP does not provide a guarantee of multiple site/entity use, nor does it provide exclusive rights to the selected supplier.

It is expected that any university with pre-existing contracts with the selected supplier will be exempt from any early termination penalties for converting to the new system issued contract. Any amounts pre-paid by a university that are higher than negotiated pricing of this contract will be credited based upon the new price structure from the date of contract execution.
Section II
Description of the Organization

II-1 PASSHE Fact Sheet

II-2 PASSHE Strategic Direction

(The balance of this page intentionally left blank)
III-1 Objective
The purpose of this RFP is to solicit proposals from exceptional suppliers that __________________________. The successful supplier will provide resources in the areas of ________________________________. The key objective is to ________________________________.

III-2 Nature and Scope of Work
PASSHE is composed of 14 universities and the Office of the Chancellor. The Office of the Chancellor is tasked with __________________________________________. The successful supplier will work with PASSHE to __________________________________________.

Timeline and Logistics:
PASSHE anticipates that this will require __________(time)________. Additional Time Details: ___________________________________________.
PASSHE provides the above timeline to provide its perspective on the project.

Any meeting plans – ie consultants to meet with PASSHE project manager weekly.

III-3 Qualification Requirements
To be considered for award, suppliers must meet all of the following requirements:

A. Supplier must have a minimum of ______ years’ experience in each type of service requirements as listed in section III-5 of this RFP.
B. Supplier must demonstrate experience working with higher education ___________, preferably in a multi-university System environment.
C. Experience with __________________________________________.
D. Supplier must demonstrate a minimum of ______ years’ experience _________(doing)__________________________.

III-4 Deliverables
The consultant will provide the following deliverables:

1) Overview of the tasks you want performed or items/documents delivered
Section IV
Information Required From Suppliers

IV-1 through IV-7 Technical Proposal

Suppliers must complete Appendix A- Technical Proposal Form.

While suppliers are encouraged to submit the most creative, cost effective proposal possible, the inclusion of extraneous commercial and/or sales literature as a substitute for responses to questions included in the proposal is strongly discouraged. Any supplemental information that you elect to provide should be attached as additional appendices.

IV-8 Response to Cost Problem

Provide a response to the Appendix B - Cost Proposal. All cost information must be separate from the technical portion of the proposal. Absolutely no pricing can appear anywhere in the technical proposal including technical proposal appendices or the supplier will be disqualified.

IV-9 Instructions for Proposal Submissions

In order to submit a proposal, interested suppliers need to register at PASSHE’s eProcurement Exchange. Registration is a free process that takes only a few minutes. Once registered, suppliers may obtain all solicitation documents, receive notification of solicitation updates, and submit and update their confidential proposals online.

PASSHE’s eProcurement Exchange provides proposal privacy, security and supplier confidentiality, while streamlining the overall procurement process. Although all solicitations are available for public viewing, interested suppliers need to register to be able to submit a proposal.

Supplier Registration Instructions

1. To register, go to PASSHE’s eProcurement Exchange and click on the ‘Register’ tab.
2. A “Vendor Quickstart Guide” is also available to assist in the registration process.

Using the PASSHE’s electronic bid management system

Sealed Bid Confidentiality – At no time before Bid Opening can anyone see your electronic bid.

Confidentiality of Identity – When questions are asked and answered, bidder identity is not disclosed to other bidders.

1. Documents – All documents may be downloaded directly to your computer. Documents can be electronically sent to your suppliers and sub contractors.
2. **Being added to the “Bidders List”** – By downloading any document, you are automatically added to the list of bidders for this solicitation.

3. **Questions** – by clicking on the “Questions” tab, you can see all questions that have been asked and answered related to this solicitation. You can also ask questions directly through this tab. When the agency answers the question, both the question and answer is emailed directly to all bidders.

4. **Submitting and Updating Bids** – You may submit and update your bid anytime up to the bid due date and time by clicking on the “Bid” tab.

**What to submit with this bid**

Click on the “Bid” tab.

- Enter financial bid (IMPORTANT NOTE: Delete this item if doing an RFP where the supplier is uploading a cost proposal instead of entering pricing directly)
- Answer RFI's (if any)
- Attach a single electronic file or zipped folder containing the documents listed below:
  - Appendix A: Technical Proposal
  - Any additional appendices to the technical proposal (please review to ensure technical appendices do not contain cost information)
  - Appendix B: Cost Proposal

**Important Note 1** - Upon request only, bidders will need to submit other documents in original form and signatures.

**How to submit your bid**

(IMPORTANT NOTE: Delete this paragraph if doing an RFP where the supplier is uploading a cost proposal instead of entering pricing directly) The Bid tab contains the electronic bid form. All Per Unit Price fields must be filled out. To no-bid a line item, insert a zero (0). PASSHE’s system will automatically complete the line extensions and bid totals. At the bottom of the page, check the Verification Statement and click Submit Bid. Completed bid form can be printed or saved to Excel by clicking the icons in the middle of the bid form page.

**Submitting documents with electronic bid**

An electronic copy of the documents listed above is to be submitted with the electronic bid. To attach theses documents:

1. Fill out required documents and scan to create a single electronic file or save as a single zipped folder containing all documents
2. From the Bid tab, click on “browse” (middle of the page), then click on the file or zipped folder name. The file will be attached to your bid submission when the Submit Bid button is clicked.

**Important Note 2** – when uploading a proposal or other document, the maximum individual file or folder size is 20Mb.
Verifying that your bid was submitted
If submitted properly, you will receive an acknowledgement appearing in the middle of your screen saying “Your bid has been recorded” and a bid receipt number will be provided.

Withdrawing Your Bid
You may withdraw your bid anytime up to bid due date and time by simply clicking on Withdraw Bid, located at the bottom of the Bid tab.

Help Guides
There are several Help Guides and video tutorials available on the various screens.

Additional Support
If additional support is needed, click on the “Contact Us” button located at the upper right of each screen or call eBid Systems technical support at (206) 855-8430.
Section V
Criteria for Selection

V-1 Evaluation of Proposals
All proposals will be reviewed and evaluated by a committee of qualified personnel selected by PASSHE. The committee will recommend for selection the proposal that most closely meets the requirements of this RFP and satisfies PASSHE’S needs.

Remember to:

- Check PASSHE’s EProcurement Exchange for addenda.
- Suppliers who submit their intent to bid will automatically be notified through email of any solicitation addenda.
- Carefully review all listed requirements to ensure compliance with the RFP.

V-2 Selection Criteria

The following areas of consideration will be used in making the selection:

1. Best pricing offered for a collaborative procurement
2. Competence and Experience of company and proposed resources
3. Demonstrated understanding of PASSHE requirements
4. Customer references
5. Willingness to agree to the required Commonwealth terms and conditions