



EDUCATION BUILT FOR LIFE

PROCUREMENT DEPARTMENT
605 Washington Street
Fayette, IA 52142
P.O. Box 1857

DATE: September 15, 2017

TO BE OPENED ON
October 13, 2017
RFP 03-18

****IMPORTANT****
PLEASE SHOW
"RFP 03-18"
ON OUTSIDE OF
MAILING ENVELOPE

Help Center Solution RFP 03-18

Sealed proposals made a part hereof will be received until **5:00 p.m. CDT, on Friday, October 13, 2017**, in the Procurement Department at Upper Iowa University, Fayette Campus, located at 605 Washington Street in Alexander Dickman, Room 206. Bid proposals are opened publicly and recorded on the bid deadline. Whether or not a proposal is timely shall be determined by reference to the clock located in the Director of Procurement's office at the University, and the determination of whether or not a proposal is timely in accordance with that clock shall be at the sole discretion of the Upper Iowa University Director of Procurement and Board of Trustees, whose decision on that issue shall be final.

REFER INQUIRIES TO: **CHERYL BEAVER**
UIU
605 WASHINGTON STREET
FAYETTE, IA 52142

TELEPHONE: **(563) 425-5305**

EMAIL ADDRESS: beaverc48@uiu.edu

FIRM INFORMATION:
Contact:
Company:
Address:
City/State/Zip:
Telephone:
Fax Number:
Email Address:

GENERAL

Proposals are subject to the attached Standard Terms and Conditions.

USING DEPARTMENT

University Wide

INTENT TO RESPOND

Vendors are urged to submit the Intent to Respond Form (Attachment B) **by Friday, September 29, 2017**. Failure to submit the Intent to Respond form may result in the Vendor's removal from consideration on future proposals.

QUESTIONS AND ADDENDUM

Any questions will be received by e-mail only, no later than **5:00 p.m. on Wednesday, September 27, 2017**. Questions will be answered by an Addendum issued on **Friday, October 6, 2017**. No contact whatsoever is to be made with any Upper Iowa University employee concerning this proposal without the knowledge and permission of the University's Director of Procurement.

PROPOSAL DUE DATE

Proposals will be received by Upper Iowa University until **5:00 p.m. CDT, on Friday, October 13, 2017**, in the Procurement Office at Upper Iowa University, located at 605 Washington Street, Fayette, Iowa, then opened publicly and recorded immediately thereafter when possible.

TIME TABLE

DATE	EVENT
Friday, September 15, 2017	E-Mailing of Request for Proposal
Friday, September 29, 2017	Submission of Intent to Respond Form Attachment B
Wednesday, September 27, 2017	Closing date for questions
Friday, October 6, 2017	Addendum (if needed) published
Friday, October 13, 2017	Proposals due at 5:00 p.m. central time
Friday, October 27, 2017	Anticipated Award of Contract

UNIVERSITY OVERVIEW

Upper Iowa University was founded in Fayette, Iowa in 1857 by Elizabeth Alexander as a co-ed college with a mission of providing access to a reasonably priced, quality education. Today, UIU is the second largest private college in Iowa and an independent, non-profit comprehensive university with a liberal arts tradition. UIU has a traditional, residential campus in Fayette, Iowa, and 25 off-campus educational centers in the United States, educational centers in Hong Kong and Malaysia, and online and self-paced degree programs. Dual enrollment courses also are available online through UIU.

The University has a combined total of 5318 full time equivalency (FTE) students and employs 73 full-time faculty members, 531 part-time faculty members, and 311 staff and administrators.

Fayette Campus:

The traditional, residential campus in Fayette attracts about 1,100 primarily undergraduate students each year, with about 1 in 5 students representing various international locations. The campus offers four 8-week terms per year, plus an optional May term. Some 40 undergraduate degree are offered in Fayette, as well as two graduate degree programs.

U.S. Center Locations:

The Centers offer evening and weekend classes through face-to-face and/or hybrid delivery. Six, 8-week terms are offered each year. Upper Iowa University centers include Alexandria (LA), Baton Rouge (LA), Blackhawk (Janesville, WI), Cedar Rapids (IA), DeRidder, (LA), Des Moines (IA), Elkhorn (WI), Fort Leavenworth (KS), Fort Polk (LA), Fort Riley (KS), Fort Sill (OK), Madison (WI), Mesa (AZ), Milwaukee (WI), New Orleans (LA), Prairie du Chien (WI), Quad Cities (Bettendorf, IA), Rockford (IL), Waterloo (IA), and Wausau (WI).

International Center Locations:

Upper Iowa University has centers overseas in Hong Kong and Malaysia. These locations primarily serve local students but the programs are also open to students interested in studying abroad. Majors are limited and term lengths depend on location.

Online Program:

The Online Program, initiated in 1999, offers over 20 undergraduate majors and four graduate programs through asynchronous delivery. The Online Program offers six 8-week terms each year. UIU offers seamless movement allowing students the flexibility to take classes in Fayette, at one of the U.S. or International centers, online or through self-paced. Over 54% of all UIU students take at least one online class each year. Upper Iowa University offers online courses to eligible high school students to increase the students' opportunities to take college-level courses.

Self-Paced Degree Program:

The Self-Paced Degree Program started in 1973 and was one of the first of its kind in the nation. Over 130 courses are offered in paper and/or web-based formats with a six month enrollment period and the option to extend for six months. The program features 12 enrollment periods throughout the year allowing students the flexibility to enroll in a new course at the beginning of any month. Depending on the format of the course, coursework and communication are delivered via the web-based classroom using our LMS or by mail or

email (LMS gradebook is used for the paper-based version). Students work in a one-on-one environment with instructors while enjoying the flexibility of studying at their own pace.

Upper Iowa University Mission:

"Upper Iowa University provides quality educational opportunities accessible through varied delivery methods to inspire success and empower lives."

Upper Iowa University Vision:

"Upper Iowa University will be recognized internationally for academic excellence and continual innovation in student-centered learning."

PROJECT OVERVIEW AND SCOPE OF SERVICES

Upper Iowa University (UIU) is seeking a sole partner to provide a 24/7/365 Help Center solution based upon 10,000 service requests.

Please provide responses to the questions outlined below.

1. What industry is your market focus?
2. What customer contact methods do you support?
3. Does your proposal include a services ticketing system? If so, is it required?
4. Do you follow ITSM framework?
5. Where are your call centers located?
6. Please describe your service model.
7. Please describe the general scope of services offered through the helpdesk.
8. Please provide average, as well as targeted SLAs.
9. Do you record phone calls for training purposes?
10. When is your maintenance window?
11. Please give examples of generic reports as well as custom reports available.
12. Please describe your major incident procedure.
13. Please describe your technician training model.
14. Do you have flexible billing options? If so, please describe.
15. Please describe termination rights.
16. Please describe how we would be trained.
17. Please describe your implementation timeline.
18. Please describe your branding policy.
19. Do you have a knowledge management offering?
20. Please describe your escalation path and procedure.
21. What is your change order process?
22. Please list any assumptions utilized during the RFP response
23. Do you offer remote assistance?
24. How do you assess customer satisfaction?
25. Please describe your continued communications practice.
26. Please provide a high-level overview of implemented security practices regarding customer information.
27. Please describe your backup practice and retention policy
28. Please provide 3 contact information of higher education references currently using the proposed service.

CONTRACT PERIOD

The contract period for the Help Center solution shall be a two-year maximum. Either party may terminate this Agreement if the other party breaches any term or condition of this Agreement and fails to cure such breach within five (5) days of receipt of written notice of such breach. In addition, Upper Iowa University may terminate this Agreement for any reason whatsoever upon thirty (30) days prior written notice to Service Provider.

CONTRACT AWARD

Any award of contract resulting from this RFP will be made only by written authorization in the form of the Acceptance of Proposal section of the Execution of Proposal (Attachment C) being signed by the Director of Procurement, and sent to the winning offeror. The finalized contract will be drafted following the completion of the RFP process.

EVALUATION PROCESS

After determining that a proposal satisfies the mandatory requirements as stated, UIU will conduct an assessment of the benefits and deficiencies of each proposal. Upper Iowa University will be awarding the contract on financial contributions, ability to meet UIU's mission, goals, and institutional values.

UIU reserves the right to consider historic information and fact, whether gained from the offeror's proposal, references, interviews, or any other source, in the evaluation process. It is the offeror's sole responsibility to submit information related to the evaluation categories and that the University is under no obligation to seek such information if it is not included with the offeror's proposal.

MARKET SELECTION

Under no circumstance will the University select, attempt to select, or contemplate, market selections for the bidders. The University does not have sufficient knowledge to make agent/market pairings that would be the most advantageous for the University. More importantly, any such action might be construed in the public eye as the University having favoritism toward a particular agent and/or market, and therefore attempting to steer or determine the outcome of this bid process. The University shall not attempt, or even give the appearance of dictating market selections and creating a non-competitive environment.

ATTACHMENTS

- A. Terms and Conditions
- B. Intent to Respond
- C. Execution of Proposal
- D. Vendor Certification

INSTRUCTIONS TO VENDORS

1. Please submit four (4) proposals (one (1) original typewritten or printed in ink, two (2) copies, and one (1) digital copy emailed to marchantj@uii.edu) in a sealed package addressed and clearly marked as follows:

Procurement RFP 03-18
Upper Iowa University
Procurement Department
605 Washington Street
P.O. Box 1857
Fayette, Iowa 52142

2. Proposals submitted via fax or E-mail will only be accepted with originals and copies listed above.
3. Read and comply as applicable with the Standard Terms and Conditions (Attachment A).
4. The Intent to Respond Form (Attachment B) must be filled out and sent to Justin Marchant, Director of Procurement, as directed on the form.
5. Two completed original copies of the Execution of Proposal Form (Attachment C) (typewritten or printed and signed in ink) must be submitted with the proposal package.
6. One completed original copy of the Vendor Certification (Attachment D) must be submitted with the proposal package.
7. No taxes are to be included in any proposal or proposal price. Generally, states and political subdivisions are exempt from Federal taxes, such as excise and transportation. To the extent any sales, import or other taxes apply they are to be invoiced as a separate item.
8. Firms are urged to compute all discounts for prompt payment into the proposal prices, with terms of payment to be Net 30 days. Such proposals may receive preference. If a cash discount is proposed and accepted, it will be considered earned if paid within 30 days after receipt of correct invoice or acceptance of goods, whichever is later.
9. Trade discounts, when quoted, should be reduced to a single percentage.
10. Any proposal or bonds signed by an agent or attorney-in-fact shall be accompanied by evidence of authority.
11. It is the Firm's responsibility to correctly mark and deliver the Proposal to the Procurement Office by the specified date and time for opening. **NO EXTENSIONS WILL BE GRANTED.**
12. The University will not reimburse the Firms for any work associated with the submission of this proposal.
13. The University will evaluate all proposals and anticipates awarding a contract no earlier than the published date. The University reserves the right to accept and/or reject any or all proposals or parts thereof.

TERMS AND CONDITIONS (Attachment A)

1. **Acceptance and Rejection:** Upper Iowa University reserves the right to reject any and all bids, to waive any informality in bids and, unless otherwise specified by the bidder, to accept any item in the bid. If either a unit price or extended price is obviously in error or the other is obviously correct, the incorrect price will be disregarded.
2. **Time for Consideration:** Additional consideration may be given to bids allowing not less than 30 days for review and acceptance.
3. **Resale Price Maintenance:** Upper Iowa University opposes resale price maintenance in public bidding, and bid prices based on this or other anticompetitive practice will be subject to appropriate remedies.
4. **Non-Discrimination and Affirmative Action:** This institution is an equal opportunity provider and employer. The Vendor agrees not to discriminate against any client, employee, or applicant for employment or services because of race, creed, color, national origin, sex, marital status, age or the presence of any sensory, mental, or physical disability with regard to, but not limited to, the following: Employment upgrading, demotion or transfer; recruitment or recruitment advertising; layoffs or termination; rates of pay or other forms of compensation; selection for training; rendition of services. It is further understood that any Vendor who is in violation of this clause or any applicable affirmative action program shall be barred forthwith from receiving awards of any purchase order from the State unless a satisfactory showing is made that discriminatory practices or noncompliance with applicable affirmative action programs have terminated and that a recurrence of such acts is unlikely.
5. **Sexual Harassment:** The policy and procedure of Upper Iowa University requires eligible bidders for contracts to implement detailed and specific sexual harassment policies. Every party bidding for and/or obtaining a contract is required to have written sexual harassment policies that must include, at a minimum, a statement that sexual harassment is illegal, the definition of sexual harassment under state law, a description of sexual harassment (utilizing examples), the party's internal complaint process including penalties, the legal recourse, the investigative and complaint process and how to contact the applicable department to file a complaint and the applicability of protection against as provided by the Human Rights Act.
6. **Specifications:** Any deviation from the specification set forth must be clearly pointed out; otherwise, it will be considered that items offered are in strict compliance with these specifications, and successful bidder will be held responsible therefor. Deviations should be explained in detail.
7. **Manufacturer's Names:** Any manufacturers' names, trade names, brand names, information and/or catalog numbers used herein are for purpose of description and establishing general quality levels. Such references are not intended to be restrictive and equivalent products of any manufacturer may be offered. Determination of equivalency shall rest solely with Upper Iowa University.
8. **Information and Descriptive Literature:** Bidders are to furnish all information requested and in the spaces provided on the bid invitation form. Further, as may be specified elsewhere, each bidder must submit with his bid cuts, sketches, descriptive literature, and/or complete specifications covering the products offered. Reference to literature submitted previously does not satisfy this provision. Bids in non-compliance with these requirements will be subject to rejection.
9. **Condition and Packaging:** Unless otherwise defined in the bid invitation or submission, it is understood and agreed that any item offered or furnished shall be new, in current production and in first class condition, that all containers shall be new and suitable for storage or shipment, and that prices include standard commercial packaging.
10. **Safety Standards:** Manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source shall be constructed and approved in accordance with any State or local requirements for labeling or re-examination listing or identification marking of the appropriate safety standard organization, such as the American Society of Mechanical Engineers for pressure vessels, the Underwriters' Laboratories and/or National Electrical Manufacturers' Association for electrically operated assemblies, or the American Gas Association for gas operated assemblies. Further, all items furnished by the successful bidder shall meet all requirements of the Occupational Safety and Health Act (OSHA) and State, local, and federal requirements relating to clear air and water pollution.
11. **Samples:** Samples may be requested as a part of the solicitation or after the opening of bids. When requested, they are to be furnished as called for, free of expense, and if not destroyed will upon request be returned at bidder's expense. Bidder's request for return of samples must be made not later than the date on which they are furnished. Bidder shall label each sample individually with bidder's name and item number.
12. **Governmental Restrictions:** In the event any Governmental restrictions may be imposed which would necessitate alteration of the material, quality, workmanship or performance of any item offered on this bid prior to delivery, it shall be the responsibility of the successful bidder to notify the Procurement Department at once, indicating in his letter the specific regulation which requires such alterations. Upper Iowa University reserves the right to accept any such alteration, including any price adjustments occasioned thereby, or to cancel the contract.
13. **Award, Payment, and Assignment:** Award will be made to the responsive and responsible bidder whose bid is most economical according to criteria designated in the solicitation. Acceptance is to be confirmed by purchase order issued by or on part of the using agency, including shipping and billing instructions; the using agency is responsible for all payments. Neither the contract nor payments due may be assigned except with prior written approval of Upper Iowa University Purchasing Agent.
14. **Performance and Default:** Upper Iowa University reserves the right to require performance bond from successful bidder. Otherwise, in case of default on part of the contractor Upper Iowa University may procure the articles or services from other sources and hold the contractor responsible for any excess costs occasioned thereby. The accepted remedies of force majeure will be considered in assessing any contractor default.
15. **Patents:** The contractor agrees to hold and save Upper Iowa University, its officers, agents, and employees harmless from liability of any kind, including costs and expenses, with respect to any claim, action, cost, or judgment for patent infringements arising out of purchase or use of equipment, materials, supplies, or services covered by this contract.
16. **Reserved:** (Reserved for including any additional Standard Provisions that may be required.)
17. **Singular - Plural:** Words in the singular number include the plural and these in the plural include the singular, unless the context directs otherwise.
18. **Advertising:** In submitting a bid, bidder agrees not to use the results therefrom as a part of any commercial promotion or advertising without prior approval of Upper Iowa University Purchasing Agent.



EDUCATION BUILT FOR LIFE

INTENT TO RESPOND FORM
(Attachment B)

Due Friday, September 29, 2017

- We **shall** submit a RFP for:
- We **shall NOT** submit a RFP for: (Please check one)

Help Center Solution
RFP 03-18

Contact Person: _____

Title: _____

Company Name: _____

Street Address: _____

City, State and Zip: _____

Telephone: _____

E-Mail Address: _____

Signature: _____

Date: _____

Firms who do not submit this INTENT TO RESPOND form by Friday, 29, 2017 may be removed from our Vendor list for these services. Please e-mail or fax this form to:

Cheryl Beaver
Director of Procurement
Upper Iowa University
605 Washington Street
Fayette, Iowa 52142

Phone: (563) 425-5305
Fax: (563) 425-5310
Email: beaverc48@uiu.edu

EXECUTION OF PROPOSAL
(Attachment C)

IMPORTANT: PLEASE BE SURE YOUR ENVELOPE IS ADDRESSED AND MARKED:

Procurement RFP 03-18
Upper Iowa University
605 Washington Street
Fayette, Iowa 52142

I have examined the specifications and instructions included herein and agree, provided I am awarded an agreement to provide the specified items and/or services or work as described in the specifications and instructions for the sum in accordance with the terms stated herein. All deviations from specifications and terms are in writing and attached hereto.

COMPANY NAME _____

ADDRESS _____

CITY, STATE, ZIP _____

SIGNED (IN INK) _____

PRINTED NAME _____ DATE _____

TITLE _____

TELEPHONE NUMBER _____ FAX NUMBER _____

ACCEPTANCE OF PROPOSAL

Your proposal is accepted as indicated on this copy.

Date: _____ By: _____

Director of Procurement
Upper Iowa University

VENDOR CERTIFICATION

**RFP CHECKLIST
(Attachment D)**

- | | | | |
|----|--|-----|----|
| 1) | Did you include four (4) copies of the proposal? (One original, two copies, and a digital copy emailed to marchantj@uiu.edu) | YES | NO |
| 2) | Did you read and do you agree to all terms and conditions, including Attachment A, in this proposal? | YES | NO |
| 3) | Did you submit the Intent to Respond Form, Attachment B by Friday, September 29, 2017? | YES | NO |
| 4) | Did you complete and include two copies of the Execution of Proposal, Attachment C? | YES | NO |