

Solicitation Q31350

Electronic Screening for Philanthropic Support



Weber State University

Bid Q31350

Electronic Screening for Philanthropic Support

Bid Number Q31350
Bid Title Electronic Screening for Philanthropic Support

Bid Start Date Jul 27, 2009 4:36:03 PM MDT
Bid End Date Aug 19, 2009 2:00:00 PM MDT
Question & Answer End Date Aug 6, 2009 2:00:00 PM MDT

Bid Contact Ryan Bouwhuis
rbouwhuis@weber.edu

Contract Duration One Time Purchase
Contract Renewal Not Applicable
Prices Good for 60 days

Item Response Form

Item Q31350-1-01 - Total Costs
Quantity 1 each
Unit Price
Delivery Location Weber State University
WSU University Communications
4025 University Circle
Ogden UT 84408
Qty 1

Description
Total Costs



**WEBER STATE
UNIVERSITY**

Ogden, Utah

Invitation to Bid/RFP

Quote No:
Q31350

Due Date & Time:
Aug 19, 2009
2:00:00 PM MDT

Send Orders To:

Business Name:

Address:

Address 2:

City:

State :

Zip:

Remittance Address:
(If different from above)

City:

State:

Zip:

Contact Name:

Phone:

Fax

Email Address:

Price Guarantee Period:

(Minimum 60 Days)

FOB:

Payment Terms:

Estimated Delivery ARO

Does your company accept Mastercard credit cards?

☐ Yes

☐ No

Is your company Minority Business Enterprise?

☐ Yes

☐ No

Company's Internet Web Address:

Substitute W-9 Information:

Business, Trade, or DBA (doing business as):

(If different from above)

Check the box which describes the your type of business and provide the corresponding required information:

☐ Individual or Sole Proprietorship	Name of owner as known To Social Security Administration: SSN (Social Security Number) of owner:
☐ Limited Liability Company (LLC) ☐ Partnership ☐ Incorporated Legal Service ☐ Incorporated Med Service Corporation ☐ Incorporated Trust/Estate ☐ Federal Governmental Entity ☐ Local or State Government Entity ☐ Nonprofit Organization ☐ Sub chapter S Corporation	Name of Business as entered on charter or document creating the legal entity: TIN, EIN or FED ID: (Taxpayer Identification Number)

Certification: Under penalties of perjury, I certify that:

(1) The number(s) shown on this form is my correct taxpayer identification number(s) (or I am waiting for a number to be issued to me), **and** (2) The organization entity and all other information provided is accurate, **and** (3) I am not subject to backup withholding either because I have not been notified that I am subject to backup withholding as a result of a failure to report all interest or dividends, or the Internal Revenue Service has notified me that I am no longer subject to backup withholding. You must cross out item (3) above if you have been notified by IRS that you are currently subject to backup withholding because of under reporting interest or dividends on your tax return.

Authorized Signature

Typed Name

Title

Phone Number

Date

Request For Proposal

For Electronic Screening of Potential Candidates for
Philanthropic Support

RFP #Q31350

July 27, 2009

Weber State University
Purchasing Department
1013 University Circle
Ogden, Utah 84408-1013

TABLE OF CONTENTS

SECTION 1 - PURPOSE OF RFP.....	4
1.01 Purpose.....	4
SECTION 2 - GENERAL INFORMATION.....	4
2.01 Administrative Guidance.	4
2.02 Issuing office and RFP Reference Number.	4
2.03 Response Date.	4
2.04 Pre-Proposal Conference.	4
2.05 Inquiries.	5
2.06 Important Dates.	5
2.07 Proposal Validity Time.....	5
2.08 Consideration of Proposals.	5
2.09 Oral Presentation.	5
2.10 Gratuities.	5
2.11 Award of the Contract.	5
2.12 Contract Period and Effective Date.....	5
2.13 News Releases.	5
2.14 Protected Information.	5
2.15 Notices.	6
2.16 Incurring Costs.	6
2.17 Addendum to RFP.	6
2.18 Alternative Proposals.	6
2.19 Authorized Supplier Representatives.	6
2.20 Award of Subcontracts.	6
2.21 Assignment.	6
2.22 Remedies.	7
2.23 Compliance.	7
2.24 Cancellation.	7
2.25 Acceptance of Services Rendered.....	7
2.26 State and Local Taxes.....	7
2.27 Anti-Collusion.	7
2.28 Indemnification.	7
2.29 Insurance.....	7
2.30 Restrictions.	8
2.31 Right to Reject.	8
2.32 Record Keeping and Audit Rights.	8
2.33 Payment and Performance Evidence.	8
2.34 Price Reduction.....	8
2.35 Solicitation of Employees.....	8
2.36 Debarment.....	8
2.37 Contracts.	8

2.38	Endorsement.	9
2.39	Availability to Other State Institutions.	9
2.40	Equal Opportunity.....	9
2.41	Further Agreements.....	9
2.42	Relationship of the Parties.	10
2.43	Compliance with Payment Card Industry Data Security Standard , Data Privacy and Cardhold Information Security Program.....	10
2.44	Title to Designs and Copy.	10
SECTION 3 - SPECIFICATIONS		10
3.01	Minimum Requirements	10
3.02	Specifications.....	12
SECTION 4 - PROPOSAL RESPONSE OUTLINE.....		14
4.01	Proposal Response Outline.	14
SECTION 5 - PROPOSAL EVALUATION		14
5.01	Proposal Evaluation Criteria.	14
5.02	Evaluation.	15

SECTION 1 - PURPOSE OF RFP

- 1.01 Purpose. Weber State University (WSU) is seeking an electronic screening of constituents to provide a pool of potential prospects for philanthropic support for an upcoming capital campaign. The WSU Development Office needs to identify individuals who have the capacity to make a major gift of at least \$10,000 and gifts up to seven figures or more. From the screening results, WSU should be able to arrange the constituent database according to estimated gift capacity and propensity to give. The University is also looking for populations to target for specialized annual giving solicitations and for planned giving solicitations. The above will be accomplished through a variety of ways, including an electronic screening by an outside vendor as outlined in this request for proposal.

SECTION 2 - GENERAL INFORMATION

- 2.01 Administrative Guidance. The information provided herein is intended to assist suppliers in the preparation of proposals necessary to properly respond to this RFP. The RFP is designed to provide interested suppliers with sufficient basic information to submit proposals meeting minimum requirements, but is not intended to limit a proposal's content or to exclude any relevant or essential data therefrom. Suppliers are at liberty and are encouraged to expand upon the specifications to evidence service capability under any proposal.
- 2.02 Issuing office and RFP Reference Number. The Purchasing Department of Weber State University is the issuing office for this RFP and all subsequent addenda relating to it. The reference number for the transaction is **Q31350**. This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.
- 2.03 Response Date. In order to be considered for selection, your proposal must be received electronically via RFP Depot's website. Submitting your response to Weber State University via Bid Sync is free of charge. Please register at www.bidsync.com, or contact their customer service department at 801-765-9245.

Paper copies (**one originally, plus four copies**) will be accepted, but must be received at Weber State University Purchasing Department (1013 University Circle, Ogden, UT 84408-1013) **no later than 2:00 p.m. current Mountain Time on Wednesday, August 19, 2009**. Any proposal in route, either in the mail or other locations on the campus will not be considered timely and will be returned unopened. Proposals received after this deadline will be late and ineligible for consideration. Following the deadline, the names of those responding to the RFP will be made public. All other information will remain confidential, as provided by law (please see section 2.10 hereof).

- 2.04 Pre-Proposal Conference. **No pre-proposal** conference will be held.

- 2.05 Inquiries. All inquiries or requests for clarification or interpretation arising subsequent to the issuance of this RFP, that could have a significant impact on the responses to the RFP, should be submitted electronically via RFP Depot.

Questions and answers will be consolidated and available to all suppliers on record as having received this RFP. All inquiries must be received by **(August 6, 2009)**.

- 2.06 Important Dates. The following dates are significant for this RFP:

RFP Dated and Issued	July 27, 2009
RFP Inquiry Questions Due	August 6, 2009
Proposal Response Date	August 19, 2009

- 2.07 Proposal Validity Time. Proposals containing less than 60 calendar days acceptance time will not be considered.

- 2.08 Consideration of Proposals. The University may award a contract based on initial proposals received without discussion of such proposals with suppliers. Accordingly, each initial proposal should be submitted with the most favorable price and service available. However, The University may initiate discussions should clarification or negotiation be necessary. Suppliers shall be prepared to send qualified personnel to discuss technical and contractual aspects of their proposal.

- 2.09 Oral Presentation. An oral presentation by a supplier to supplement a proposal may be required. These presentations will be scheduled, if required, by the Purchasing Department subsequent to the receipt of proposals and prior to the award of the contract.

- 2.10 Gratuities. By written notice to the supplier(s), the University may disqualify from consideration or cancel any subsequent contract if it is found by the University that gratuities, in the form of entertainment, gifts, or otherwise were offered or given by the supplier, or any agent or representative of the supplier, to any officer or employee of the University with the intent to secure this contract or secure favorable treatment with respect to the awarding or amending of this contract.

- 2.11 Award of the Contract. The Purchasing Department is the only agency authorized to award a contract for the proposed purchases. All pertinent University policies and State of Utah purchasing codes and State procurement policies and procedures apply.

- 2.12 Contract Period and Effective Date. The anticipated contract term will be from the date of award through the course of the campaign.

- 2.13 News Releases. News releases pertaining to the RFP, any proposal or the contract will be made only by the University.

- 2.14 Protected Information. State Procurement Rule, R-33-3, as well as the Government Records Access and Management Act, Section 63-2-101 et seq., Utah Code Ann. (1953), as amended ("GRAMA") provides that **all** proposals may be disclosed to the public after notice of the selection of the successful offeror(s) and after receipt of a GRAMA request. Any person (supplier) who believes that a record should be protected

as outlined in R-33-3-204.1, should complete the enclosed "Claim of Business Confidentiality" form. Failure to complete this form will result in the disclosure of your proposal if a GRAMA request is received. All material contained in and/or submitted with the proposal becomes the property of the University and may be returned only at the University's option.

- 2.15 Notices. The supplier must specify the name, title, address, phone and email address of the person to whom all correspondence regarding any contract awarded as a result of this RFP should be directed (including amendments to the contract). All amendments must be in writing and signed by both parties.
- 2.16 Incurring Costs. The University will not be liable for any cost which suppliers may incur in the preparation or presentation of their proposal(s). Proposals should be concise, straightforward and prepared simply and economically. Expensive displays, bindings or promotional materials are neither desired nor required. However, there is no intent within these instructions to limit a proposal's content or to exclude any relevant or essential data therefrom.
- 2.17 Addendum to RFP. In the event that it becomes necessary to revise this RFP in whole or in part, an addendum will be provided to all suppliers on record as having received this RFP.
- 2.18 Alternative Proposals. A supplier may submit more than one proposal, each of which must follow the Proposal Response Outline (section 4 hereof) and satisfy the requirements of this RFP. The supplier's prime proposal must be complete and comply with all instructions. The alternative proposals may be in abbreviated form following the Proposal Response Outline but providing complete information only for sections which differ in any way from those contained in the prime proposal. If alternative proposals are submitted, the supplier must explain the reasons for the alternative(s) and its comparative benefits. Each proposal submitted will be evaluated on its own merits.
- 2.19 Authorized Supplier Representatives. The proposal will list the name, title, office address, telephone number, fax number and email address of the person(s) authorized to represent the supplier regarding this RFP. The University reserves the right to (1) interview and select supplier's personnel who will provide services and (2) negotiate a change in the individual assigned to represent the supplier awarded this contract if the assigned representative is not supplying the needs of the University appropriately. The right shall carry forward through the response period and during the term of the contract.
- 2.20 Award of Subcontracts. For each subcontract, if any, which the supplier proposes to award, the supplier shall specify in writing the proposed subcontractor's name and address, and the purpose of the subcontract. Any supplier proposing subcontracts as a part of a proposal must explicitly state so in the proposal, and must include the above stated information for each subcontract. Written approval by the University Purchasing Department is required prior to the awarding of any subcontracts. Any Subcontractor shall be required to provide evidence to the University of the same insurance provisions and coverages as described in section 2.29 of the RFP.
- 2.21 Assignment. The successful supplier shall not assign or subcontract any portion of its obligations under the contract without the prior written consent of the University.

Assignment or subcontracting shall in no way relieve the successful supplier of any of its obligations.

- 2.22 Remedies. The laws of the State of Utah shall apply in all disputes arising out of this RFP, without regard to Utah choice of law rules.
- 2.23 Compliance. The supplier hereby agrees to abide with all applicable federal, state, county and city laws and regulations and to be responsible for obtaining and/or possessing any and all permits and licenses that may be required.
- 2.24 Cancellation. Inadequate delivery or failure to adhere to the contract covenants may result in cancellation of the contract. The supplier shall be responsible for reimbursing the University for expenses incurred as a result of unacceptable service. In the event that either party determines that a material breach has occurred that would be cause for cancellation of the contract, the party wishing to cancel shall notify the other party of the alleged breach in writing, and allow the defaulting party thirty (30) days in which to cure the alleged breach. If the alleged breach is not cured or substantial steps to cure the alleged default are not taken within this period, the non-defaulting party may cancel the contract at the end of said thirty (30) day period.
- 2.25 Acceptance of Services Rendered. The University, through its designated agents and representatives, will be the sole determining judge of whether services rendered under the contract satisfy the requirements as identified in the contract.
- 2.26 State and Local Taxes. The University is exempt from sales and excise taxes. Exemption certification information appears on all purchase orders issued by the University and such taxes will not apply unless otherwise noted.
- 2.27 Anti-Collusion. The submittal of a proposal constitutes agreement that the supplier has not divulged its proposal to suppliers, nor has the supplier colluded with any other suppliers or parties to a proposal what-so-ever.
- 2.28 Indemnification. The supplier shall hold harmless, defend and indemnify Weber State University and its officers, employees, and agents from and against any and all claims, losses, causes of action, judgements, damages and expenses including, but not limited to attorney's fees because of bodily injury, sickness, disease or death, or injury to or destruction of tangible property or any other injury or damage resulting from or arising out of (a) performance or breach of this contract by Supplier, or (b) Supplier's use of University premises, or © any act, error, or omission on the part of the Supplier, or its agents, employees, or subcontractors except where such claims, losses, causes of action, judgements, damages and expenses result solely from the negligent acts or omissions or willful misconduct of Weber State University, its officers, employees or agents.
- 2.29 Insurance. The supplier shall maintain, during the term of any resulting contract, comprehensive General, Contractual, Professional and Errors and Omissions (E&O) Liability Insurance and Employee Dishonesty bonding coverage or such coverages as

required by Federal, State, and local laws governing the services described herein. Proposers shall also maintain all employee-related insurances, in the statutory amounts, such as unemployment compensation, worker's compensation, and employer's liability, for its employees involved in performing services pursuant to any resulting underwriting contract. Such coverages may be self funded.

- 2.30 Restrictions. All proposals must clearly set forth any restrictions or provisions deemed necessary by the supplier to effectively service the proposed contract.
- 2.31 Right to Reject. The University reserves the right to reject in whole or in part any or all proposals and to waive any informality or technicality in any proposal in the interest of the University. Subsequent procurement, if any, will be in accordance with Weber State University contractual action. Non-compliance with the conditions of this proposal may result in disqualification of the offending supplier.
- 2.32 Record Keeping and Audit Rights. Any supplier providing goods or services under any Contract shall maintain accurate accounting records for all goods and services provided thereunder, and shall retain all such records for a period of at least three (3) years following termination of the Contract. Upon reasonable notice and during normal business hours the University, or any of its duly authorized representatives, shall have access to and the right to audit any records or other documents pertaining to the Contract. The University's audit rights shall extend throughout the term of the Contract and for a period of at least three (3) years thereafter.
- 2.33 Payment and Performance Evidence. Supplier will provide evidence of financial responsibility, which demonstrates the Supplier's ability to perform the services contemplated by the RFP. Such evidence of financial strength may be in the form a performance bond, letter of credit, financial statements or other form which is reasonably acceptable to the University.
- 2.34 Price Reduction. If at any time after the award of a contract, the successful supplier reduces the price of any article or service covered under the contract resulting from this RFP, the successful supplier shall give the University proportionately reduced pricing for such articles or services.
- 2.35 Solicitation of Employees. The selected supplier and the University agree not to solicit each other's employees for a period of 2 years following completion of contract.
- 2.36 Debarment. The Contractor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible , or voluntarily excluded from participation in this transaction (contract), by any governmental department or agency. If the Contractor cannot certify this statement, attach a written explanation for review by WSU.
- 2.37 Contracts. If you wish your contractual document(s), in whole or in part, to comprise a portion of the final governing language of any agreement arising from this RFP, (including maintenance agreements), a copy of that agreement(s) must be submitted

with your response. A legal review of your contractual demands in view of what is acceptable to the University as an entity of the State of Utah shall be part of the criteria in evaluating our offer.

The University will not enter into any contract or affix signature to any document, the terms of which require the University to waive conditions or requirements negotiated via this solicitation process, provided for in the document or by mutual consent. Any document containing a clause or clauses that purport to supersede all other documents included in, or arising from the RFP process will be rejected.

- 2.38 Endorsement. Unless specifically authorized in writing by the University Purchasing Department on a case by case basis, the Contractor shall have no right to use, and shall not use, the name of Weber State University, its officials or employees, or the seal or mark of the University in advertising, publicity, or promotion; nor to express or imply and endorsement of Contractor's supplies or services.
- 2.39 Availability to Other State Institutions. In the event a contract between the University and the Supplier results from the RFP, the Supplier shall offer the same prices, terms, conditions, and all other particulars herein to all other institutions within the State of Utah. Provided however, that the Supplier may apply fair and reasonable delivery cost adjustments to those institutions whose location may be materially remote or primate when compared to the delivery distances contemplated under this RFP.
- 2.40 Equal Opportunity. Consistent with University's policies, in connection with any work performed upon acceptance of bid, the Contractor agrees to abide by the letter and spirit of the Civil Rights Act of 1964, 45 CFR 90, and Federal Executive Order No. 11246, as amended by Executive Order No. 11375, as applicable, which are incorporated herein by reference. Contractor also agrees to comply with the American Disabilities Act of 1990 and Sections 503 and 504 of the Rehabilitation Act of 1973. Contractor agrees to comply with the provisions of the Utah Antidiscrimination Act and any Utah Executive Order regarding discrimination. Contractor agrees to incorporate these provisions as necessary with regard to any subcontracts and to provide all required notices to each labor union or workers' representative stating the Contractor's responsibilities under these provisions. Specifically, Contractor agrees not to discriminate against any employee or applicant for employment because of race, color, creed, religion, national origin, sex, sexual preference, marital status, veteran's status, status with regard to public assistance, disability or age. This provision will include, but not be limited to, the following: employment, upgrading, promotion, demotion or transfer, recruitment advertising, lay off or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. Contractor further agrees to take affirmative action to insure equal employment opportunities.
- 2.41 Further Agreements. In addition to a proposal, the University may from time to time require a supplier to execute certain additional documents or agreements, including without limitation a Contract, for the purpose of clarifying the intention of the parties with respect to providing the goods or services hereunder.

- 2.42 Relationship of the Parties. In assuming and performing the obligations of any Contract, the University and any supplier shall each be acting as independent parties and neither shall be considered or represent itself as a joint venturer, partner or employee of the other.
- 2.43 Compliance with Payment Card Industry Data Security Standard , Data Privacy and Cardhold Information Security Program.
The Supplier agrees to comply with the Payment Card Industry Data Security Standard (PCIDSS), Data Privacy and with Visa's Cardholder Information Security Program (CISP).
- 2.44 Title to Designs and Copy. Title to all concepts, plans, strategies, and other supplies and services produced/purchased as a result of this RFP, will become the property of Weber State University.

SECTION 3 - SPECIFICATIONS

- 3.01 Minimum Requirements. WSU is searching for a firm to provide electronic screening services based on the specifications noted in the purpose of this request for proposal.

The successful vendor must provide the following:

- A. A proven statistical modeling methodology for estimating wealth based on demographic information found in the WSU constituent database.
- B. A proven methodology for accurately matching constituent records against the records in public information databases containing public company insiders, private company owners and executives, foundation trustees, owners of significant real estate holdings, donors to other charities or causes, and biographical databases. At a minimum, constituent database must be matched against (Note: Other similar publication information databases may be accepted in lieu of those listed below):
 - 1. Thomson and/or Vickers SEC Insiders
 - 2. Lexis/Nexis or Dataquick Real Property Records
 - 3. Dun & Bradstreet (private company)
 - 4. Federal Election Commission
 - 5. Marquis Who's Who

6. Database(s) used for lifestyle and/or personal profiling
- C. Description of (1) any pre-screening that is done with the data including used, portion/range of the database, i.e. Dun and Bradstreet sales in excess of \$1 million, and (2) maximum number of hits from the pre-screening that are further screened against the remaining databases.
- D. An indicator of the confidence level of matches made between WSU database and public information databases used by vendor. Instructions describing the various types of indicators used. Confidence level indicator should be included on each record returned from the vendor to WSU.
- E. Data returned will be in one single network-ready database containing the entire results of the screening. All data provided by the university remains property of the university and must be kept confidential.
- F. Clients must have the ability to search, edit, and add to the information contained in the database, along with the ability to export data from the database to Microsoft Excel, Microsoft Access, and/or text file delimited by commas or tabs.
- G. Capability for client to supply fields that are returned as part of the screening results and the ability to search and sort on the client-supplied fields.
- H. Database must be compatible with **SCT Banner** 8.1 and Oracle-based servers/workstations, Windows/Office XP and Vista, and upcoming Windows operating systems, CD or DVD or SFTP or other secure encrypted method for data transmission.
- I. Consulting assistance on integrating the screening results with the Weber State constituent database. Client must be able to easily upload data from the screening to Banner.
- J. The ability for the client to easily produce and customize reports generated from the database without the need to learn a specific programming language.
- K. The ability for the client to add additional notes to the final format, as well as the ability to make edits to the returned information.
- L. A stated delivery date or dates of the screening results.
- M. On-site training interpreting the results and the use of vendor-supplied technology at the time screening results are delivered.
- N. Vendor interpretation of screening results with a view

- toward highlighting the best major gift prospects, annual giving prospects, and planned giving prospects.
- O. A minimum of one-year customer service and client support after delivery of the results.
- P. Software licensing agreement for software and additional updates.
- Q. Assistance and consultation with the preparation of data (computer tapes or disks) for the screening.
- R. The ability for the user to update/refresh prospect wealth data on vendor-supplied database after initial matching process.
- S. (Data Privacy) Vendor must maintain the shared information in strictest confidence. Vendor cannot use the Information for their own benefit or the benefit of third parties. Vendor must take all reasonable precautions in handling the university's shared information.
- T. (Network Components, Applications, Servers) Vendor is responsible for the security of all shared data in its possession. Vendor will ensure all applications have the most current security patches and are tested for vulnerabilities on a regular basis. Vendor will have a business continuity program in the event of a major disruption in its operations or in the event of any other disaster or system failure which may occur to vendor's operations. Vendor will continue to safeguard shared data after the agreement terminates or expires.

3.02 Specifications.

- A. Ability to assist WSU to meet its goals for a prospect screening product and meet the technical and performance specifications as described in this RFP. Describe if and how your firm is able to provide the following:
 1. Scoring and ranking of (a) asset and wealth indicators, (b) attachment indicators, and (c) philanthropic likelihood indicators.
 2. Birth dates for constituents screened.
 3. Employment information for constituents screened.
 4. Real property held in trust.
 5. In-depth biographical data including interests and non-profit board memberships.
 6. How do you handle spouse records linked to an entity? Is the spouse record automatically screened as part of the initial record submitted or is the spouse treated individually and screened as a separate record?

7. Provide historical match rates for each database and the estimated match rate for WSU.
 8. Describe the product reporting abilities.
- B. Pre-Screening, implementation, and training. Respond to the following:
1. Provide a detailed plan of operation. Include requirements of WSU as well as what will be provided, and the time line.
 2. What amount of time is required to return data?
 3. Provide a detailed end-user and technical training plan.
 4. Describe the database to be used to screen records against, including size/range of database. Additionally, if pre-screening is done as part of the proposal, describe (a) if the pre-screening uses wealth or demographic databases or both; (b) the pre-screening process (databases used, size of database, and what portion/range of database); (c) number/percent of records from the pre-screening process that are screened against remaining databases, along with a description of the databases, including size/range.
 5. List all hardware and software requirements.
- C. Value-added service/References (customer service after delivery of product, highly-desired vendor deliverables). Describe the available tools/resources pertaining to the following:
1. Ability to quickly and easily evaluate private company data provided to WSU.
 2. Mapping system integration into the vendor-supplied database to help identify where prospects are located geographically.
 3. Post implementation and training support, including how WSU will access this support.
 4. Provide any detailed warranty that may be included with the product.
 5. Provide a minimum of three (3) references, complete with the organization name, contact person, and telephone number for whom you have provided services similar to the scope of work outlined above.
- D. Cost. Provide pricing for the following (Submit independently from your response, either in a separate envelope or as a separate attachment):
1. Screening of 50,000 records, 70,000 records, and 90,000 records.
 2. Software license renewals beyond initial contract
 3. Training
 4. Any additional costs associated with using the firm's

- products or software
- 5. Re-screening select portion of data or new data
- 6. Costs associated with post implementation training support.

SECTION 4 - PROPOSAL RESPONSE OUTLINE

- 4.01 Proposal Response Outline. Proposals must be concise and in outline format. Pertinent supplemental information should be referenced and included as attachments. All proposals must be organized and tabbed to comply with the following sections:
- A. LETTER OF TRANSMITTAL. The letter of transmittal should include an introduction of the supplier or company, the name, address, telephone number, fax number and E-mail address of the person(s) to be contacted along with others who are authorized to represent the company in dealing with this RFP. Any other information not appropriately contained in the proposal itself should also be included in the letter.
 - B. EXECUTIVE SUMMARY. An executive summary will briefly describe the supplier's approach and clearly indicate any options or alternatives being proposed. It should also indicate any major requirements that cannot be met by the supplier.
 - C. DETAILED DISCUSSION. This section should constitute the major portion of the proposal and must contain **a specific response in outline form to each section in this RFP which requires a response. Outline numbers should correspond, in order, to the section numbers contained in this RFP.** Failure to provide written response to items indicated in this RFP will be interpreted by the University as an inability by the supplier to provide the requested product, service or function.
 - D. COST PROPOSAL. The supplier must submit a cost proposal allowing costs to be evaluated independently of other criteria in the proposal. Appendix A should be completed and provided as a separate document.
 - E. FINANCIAL REPORTS. The supplier should furnish a current audited financial report for the company's most recent fiscal year.
 - F. MISCELLANEOUS. Additional information and attachments, if any may be submitted by the supplier.

SECTION 5 - PROPOSAL EVALUATION

- 5.01 Proposal Evaluation Criteria. The criteria to be used by the Selection Committee to evaluate proposals are as follows:

- A. Ability to assist WSU to meet its goals for a prospect screening product and meet the technical and performance specifications as described in this RFP (35 pts)
- B. Training program in the support of staff to learn how to access, manipulate, and interpret the returned data (25 pts)
- C. Value-added service/References (customer service after delivery of product, highly-desired vendor deliverables) (10 pts)
- D. Cost (30 pts)

5.02 Evaluation. All proposals in response to this RFP will be evaluated in a manner consistent with the Utah Procurement Code and all applicable rules and policies. In the initial phase of the proposal evaluation process, the evaluation committee will review all proposals timely received. First, non-responsive proposals (those not conforming to RFP requirements) will be eliminated. Second, the remaining proposals will be evaluated in a cursory manner to eliminate from further consideration those proposals which in the judgement of the evaluation committee fail to offer sufficient and substantive provisions to warrant further consideration. Each supplier bears sole responsibility for the items included or not included in the response submitted by that supplier. The University reserves the right to disqualify any proposal that includes significant deviations or exceptions to the terms, conditions and/or specifications in this RFP.

At the conclusion of this initial evaluation phase, finalist supplier proposals will be selected for detailed review and evaluation, including oral presentations if required. The University reserves the right to be the sole judge as to the overall acceptability of any proposal or to judge the individual merits of specific provisions within competing offers.

Question and Answers for Bid #Q31350 - Electronic Screening for Philanthropic Support

OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.

Question Deadline: Aug 6, 2009 2:00:00 PM MDT