



Request for Proposals

For

Proctoring Solutions: Live Online and Automated

Issued by:

Pennsylvania's State System of Higher Education
Office of the Chancellor

RFP #2020-COOP-LAV-45

Publication Date: September 24, 2020

Submission Date: October 26, 2020; 2:00 P.M. EST

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Proctoring Solutions

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Section I General Information

I.1 Overview

This Request for Proposals (RFP) provides interested Offerors with sufficient information to prepare and submit proposals for consideration by Pennsylvania's State System of Higher Education to provide: **Proctoring Solutions: Live Online and Automated.**

Pennsylvania's State System of Higher Education (State System or Principal Procurement Agency) has partnered with [OMNIA Partners](#) to make the resultant contracts (Master Contracts) from this solicitation available to other public agencies nationally, including state and local governmental entities, public and private primary, secondary, and higher education entities, non-profit entities, and agencies for the public benefit (Public Agencies), through OMNIA Partner's cooperative purchasing program. The State System is acting as the lead contracting agency for any other Public Agency that elects to utilize the resulting Master Contracts. Use of the Master Contracts by any Public Agency is preceded by registration with Omnia Partners (a Participating Public Agency). Appendix C contains additional information about OMNIA Partners and its cooperative purchasing agreement.

This RFP is expected to result in multiple participation award contracts. Multiple awards will ensure that any ensuing Master Agreements fulfill current and future requirements of the diverse and large number of Participating Public Agencies. Qualified suppliers are invited to submit proposals based on the information provided in this RFP, with the intent to establish a national cooperative business alliance with Pennsylvania's State System of Higher Education and OMNIA Partners that will maximize the resources of both organizations to most effectively meet OMNIA Partners national participating agencies' and Pennsylvania's State System of Higher Education needs.

I.2 Issuing Office

This RFP is being issued for the State System by the Issuing Office listed below. The Issuing Office is the sole point of contact for this RFP. Please refer all inquiries to:

[Linda A. Venneri](#), CPSM
Collaborative Contracts Manager
[Pennsylvania's State System of Higher Education](#)
Office of the Chancellor
Dixon University Center
2986 North Second Street
Harrisburg, PA 17110
717-720-4135

From the Publication Date of this RFP until a determination is made regarding the selection of proposals, all contacts concerning this RFP must be made through the Issuing Office. Only information supplied by the Issuing Office, including responses to questions regarding the RFP, should be used in preparing proposals. If it is later discovered that any violations have occurred, the State System may reject the proposal and terminate the awarded contract.

I.3 Calendar of Events

Description	Date
Publication Date	September 24, 2020
Preproposal Conference	October 9, 2020
Deadline for Questions	October 15, 2020
Amendment Issued (Questions/Answers)	October 16, 2020
Submission Date/Time	October 26, 2020; 2:00 P.M. EST
Award	Estimated by November 18, 2020
Start	Upon execution of contract; estimated December 28, 2020

Preproposal Conference details will be shared separately with Offerors who select “Yes” in response to the Intent to Bid section at the State System’s [eProcurement Exchange](#).

I.4 Description of the Organization

- A. Pennsylvania’s [State System of Higher Education](#) (State System) was established by statute on July 1, 1983 and comprises [14 universities](#).
- B. In accordance with Title 62, Commonwealth Procurement Code, the State System facilitates a competitive bidding and contracting process. The Office of the Chancellor’s Strategic Sourcing Office supports the 14 universities, and is responsible for identifying strategic contracting opportunities and establishing best value contracts in partnership with its Offerors.

I.5 Instructions for Proposal Preparation

- A. **Economy of Preparation.** Proposals should be prepared simply and economically, providing a straightforward, concise description of the Offeror’s ability to meet the requirements of this RFP.
- B. **Proposals.** Proposals must consist of a complete response to this RFP.
 - 1. Proposals must be submitted online utilizing the State System’s [eProcurement Exchange](#).
 - 2. Proposals must consist of a complete response to the requirements outlined herein and shall be submitted to the Issuing Office no later than the required proposal Submission Date/Time listed above. Late proposal submissions will not be permitted.
 - 3. Proposal contents may become contractual obligations if and when a contract is executed.
 - 4. The proposal, as submitted, must remain valid during the entire solicitation, award, and contract finalization process.
 - 5. All cost data must be submitted as a separate document (Appendix B, Cost Proposal Form) apart from the Technical Proposal. **Absolutely no pricing can appear anywhere in the Technical Proposal.** Failure to meet this requirement will result in automatic disqualification of the proposal.

- C. **Questions.** Offerors may submit questions surrounding the RFP at the State System's [eProcurement Exchange](#). Answers to all questions will be posted as an addendum to the RFP and will become part of this RFP. Note: Offerors' identities will not be disclosed.
- D. **Addenda.** If it becomes necessary to revise any part of the RFP, addenda will be posted at the State System's [eProcurement Exchange](#). The information contained at this website is current and accurate. It is the Offeror's responsibility to check this website periodically to obtain any changes to the solicitation. Offerors must acknowledge all addenda in their proposal response. Offerors who fail to submit a current copy of the solicitation may be deemed nonresponsive.
- E. **Preproposal Conference.** A non-mandatory preproposal conference will be held at the location, date, and time specified above in Section I.3. The purpose of this conference is to clarify any points in the RFP which may not have been clearly understood. The preproposal conference is for information only. Answers to any questions asked during the conference will not be official until verified in writing by the Issuing Office via an Amendment to the RFP.
- F. **Best and Final Offers.**
1. While not required, the Issuing Office reserves the right to conduct discussions with Offerors for the purpose of obtaining Best and Final Offers (BAFOs). Negotiations may be pursued with a subset of responsible Offerors whose proposals best meet financial, contractual, technical, and support requirements for the University. Negotiations will be opened with firms of lower preference (one at a time, in order of preference) only if a fair and reasonable set of fees/billable rates and/or agreement of final contract terms and conditions cannot be established with the firm of higher preference.
 2. To obtain BAFOs from Offerors, the Issuing Office may do one or more of the following, in any order: (a) schedule oral presentations, (b) request revised proposals, or (c) enter into preselection negotiations.
 3. The following Offerors will not be invited by the Issuing Office to submit a BAFO: (a) those Offerors whom the Issuing Office has determined to be nonresponsive; or whose proposals the Issuing Office has determined to be nonresponsive, (b) those Offerors whom the Issuing Office has determined, from the submitted technical and cost proposals, not to possess the experience or qualifications to ensure good faith performance of the contract, or (c) those Offerors who technical proposal score is less than 75 percent of the total amount of technical points allocated to the technical criterion.
- G. **Response Date.** To be considered for selection, proposals must be submitted at the State System's [eProcurement Exchange](#) by the proposal Submission Date listed above.
- H. **Rejection of Proposals.** The University reserves the right to reject any and all responses received from Offerors as a result of this RFP, and to cancel this solicitation at any time prior to the execution of any contract.
- I. **RFP Protest Procedure.** The notice concerning Protest of Solicitation or Award is published at the State System's [website](#).
- J. **Incurring Costs.** The University is not liable for and will not reimburse any costs or expenses incurred by Offerors in the preparation or submission of their proposals or for attendance at any conferences or meetings related to this RFP.

- K. **News Releases.** News releases pertaining to this RFP or any resulting contract may not be made without the State System's prior written approval, and then only in coordination with the Issuing Office.
- L. **Contractor Integrity Provisions.** It is essential that those who seek to contract with the Commonwealth of Pennsylvania (Commonwealth) observe high standards of honesty and integrity. They must conduct themselves in a manner that fosters public confidence in the integrity of the Commonwealth contracting and procurement process.
- M. **Contractor Responsibility Program.** Offerors 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 of their knowledge. Additionally, Offerors 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. Offerors 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. Offerors can certify to all of the above upon submittal of their proposal at the State System's [eProcurement Exchange](#).

Section II Post Award

II.1 Contract Award

The State System reserves the right to (1) award a single contract, (2) award multiple contracts, or (3) not award a contract. Negotiations will be pursued with a subset of responsible respondents whose proposals best meet the financial, contractual, technical, and support requirements for the University. This RFP shall not result in an exclusive rights contract.

National Contract

Pennsylvania's State System of Higher Education, as the Principal Procurement Agency, defined in Appendix C, has partnered with OMNIA Partners, Public Sector ("OMNIA Partners") to make the resultant contract (also known as the "Master Agreement" in materials distributed by OMNIA Partners) from this solicitation available to other public agencies nationally, including state and local governmental entities; public and private primary, secondary and higher education entities; non-profit entities; and agencies for the public benefit ("Public Agencies"), through OMNIA Partners' cooperative purchasing program. Pennsylvania's State System of Higher Education is acting as the contracting agency for any other Public Agency that elects to utilize the resulting Master Agreement. Use of the Master Agreement by any Public Agency is preceded by their registration with OMNIA Partners (a "Participating Public Agency") and by using the Master Agreement, any such Participating Public Agency agrees that it is registered with OMNIA Partners, whether pursuant to the terms of a Master Intergovernmental Purchasing Cooperative Agreement, a form of which is attached hereto on Appendix C, or as otherwise agreed to. Appendix C contains additional information about OMNIA Partners and the cooperative purchasing program.

OMNIA Partners is the largest and most experienced purchasing organization for public and private sector procurement. Through the economies of scale created by OMNIA Partners public sector subsidiaries and affiliates, National IPA and U.S. Communities, OMNIA participants now have access to more competitively solicited and publicly awarded cooperative agreements. The lead agency contracting process continues to be the foundation on which the organization is founded. OMNIA Partners is proud to offer more value and resources to state and local government, higher education, K-12 education and non-profits.

OMNIA Partners provides shared services and supply chain optimization to government, education and the private sector. With corporate, pricing and sales commitments from the Supplier, OMNIA Partners provides marketing and administrative support for the Supplier that directly promotes the Supplier's products and services to Participating Public Agencies through multiple channels, each designed to promote specific products and services to Public Agencies on a national basis. Participating Public Agencies benefit from pricing based on aggregate spend and the convenience of a contract that has already been advertised and publicly competed. The Supplier benefits from a contract that generally allows Participating Public Agencies to directly purchase goods and services without the Supplier's need to respond to additional competitive solicitations. As such, the Supplier must be able to accommodate a nationwide demand for services and to fulfill obligations as a nationwide Supplier and respond to the OMNIA Partners documents found in Appendix C.

Pennsylvania's State System of Higher Education anticipates spending approximately \$5 million over the full potential Master Agreement term for **Proctoring Solutions: Live Online and/or Automated**. While no minimum volume is guaranteed to the Supplier, the estimated annual volume of **Proctoring Solutions: Live Online and/or Automated** purchased under

the Master Agreement through OMNIA Partners is approximately \$50 million. This projection is based on the current annual volumes among Pennsylvania's State System of Higher Education, other Participating Public Agencies anticipated to utilize the resulting Master Agreement to be made available to them through OMNIA Partners, and volume growth into other Public Agencies through a coordinated marketing approach between the Supplier and OMNIA Partners.

II.2 **Contract Terms**

- A. 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 Commonwealth of Pennsylvania Standard Contract [PASSHE-BB-3.1](#). The State System reserves the right to amend its Standard Contract Terms and Conditions.
- B. The term of the contract resulting from this solicitation will be for a term of three years with the option to renew for an additional two annual periods.
- C. Contract terms and conditions are negotiated upon issuance of an intent to award a contract. Certain contract terms are prohibited based on the State System's status as an agency of the Commonwealth of Pennsylvania. Prohibited contract clauses include those related to: arbitration, assignment, attorney's fees, court costs, entry of judgment, indemnity or hold-harmless provisions, law of the contract in a jurisdiction other than Pennsylvania, payment in advance, and payment of or requirement to carry insurance.
- D. The following contract elements of the [Standard Contract for a Blueback Contract](#) are required, and the University reserves the right to refuse any and all requested changes to the following:

Section	Description
19	Limitation of University Liability
20	Hold Harmless
27	Nondiscrimination
28	Sexual Harassment
30	Background Checks for Minors
31	Mandatory Reporting Requirements
32	Contractor Responsibility
33	Contractor Integrity
36	Right of Offset
37	Right-to-Know Law
38	Applicable Law

- E. The Offeror will be deemed to have accepted the standard terms and conditions, except as expressly called out in its proposal. If exceptions are taken, the Offeror must submit a "redlined" version of the term or condition showing all proposed modifications, including an explanation as to why the modification is required. **The Offeror's willingness to accept the State System's contract terms and conditions, with minor clarifications, shall be an affirmative factor in evaluating the supplier's proposal.**
- F. Although the University will consider alternate language by an Offeror, the State System will not be bound by contract language received as part of a prospective provider's

response. If the Offeror requires that the State System be bound by some or all of the Offeror's proposed contract language, the proposal may be considered nonresponsive and may be rejected.

II.3 Proposer's Exceptions to Terms and Conditions

Any exceptions, deviations, or contingencies an Offeror may have to the State System's contract terms and conditions must be documented. Exceptions, deviations, or contingencies stipulated in an Offeror's proposal, while possibly necessary in the view of the Offeror, may result in disqualification of a proposal.

II.4 Prime Offeror/Subcontracting

Eligible Offerors will be considered prime Offerors with respect to any work they are awarded. Any use of subcontractors must be approved in writing by the State System. Prime Offerors are encouraged to solicit quotes from small diverse businesses when requiring subcontractors.

II.5 Disclosure of Proposal Contents and Open Records

- A. Offerors' proposals may become part of the contract award resulting from this RFP and are not, therefore, confidential. The State System 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.
- B. All responses to procurement opportunities are subject to Pennsylvania's Right-to-Know Law, 65 P.S. §67.101 et seq. (Act 3 of 2008). The Right-to-Know Law permits requestors to inspect and/or copy any record prepared, received, or retained in connection with a transaction, business, or activity of a public office or agency that is not subject to the enumerated exemptions under the law. If an Offeror's response to this procurement opportunity contains a trade secret or confidential proprietary information, the Offeror's response should include a separate signed written statement to that effect identifying any such information. Should the Offeror's response become the subject of a Pennsylvania Right-to-Know Law request, the procurement office will notify the Offeror to identify or confirm all trade secrets or confidential and proprietary information that is included in the Offeror's proposal. The State System will then determine whether the claimed trade secret or confidential and proprietary information is subject to disclosure under applicable law and grant or deny the request accordingly. Should the request be denied and the requestor appeal that denial, the State System will notify the Offeror of the appeal and the Offeror's opportunity to request to participate in the appeal as a party of interest. The State System will not represent the interests of the Offeror in any appeal nor will the State System compensate or reimburse any expenses of the Offeror in connection with a request of information under the Right-to-Know Law.

II.6 Debriefing Conference

Offerors whose proposals are not selected will be notified of the name of the selected supplier(s) and will be given the opportunity to be debriefed. The purpose of a debrief conference is not to compare proposals, but to provide information that may assist individual Offerors in preparing future proposals. The Issuing Office will schedule the date, time, and location of the debrief conference.

Section III Work Statement

III.1 Objective

The State System is soliciting proposals to provide **Proctoring Solutions: Live Online and/or Automated** that integrate with various Learning Management Systems (LMS). Offerors must be able to authenticate a student's identity, provide oversight for assessments/exams, and inform faculty of issues that arise during the examination process. Exams may be expected to be proctored remotely.

III.2 Nature and Scope of the Project

Offerors are expected to provide a secure and flexible Proctoring Solution for live online and/or automated testing. The State System seeks cost effective, convenient, and customizable solutions. The Proctoring Solution should allow the flexibility for faculty to select the level of online test security and to customize the test environment to meet desired exam specifications. It must be one that students and faculty can understand and easily use, and in which faculty have faith in as having a very high probability of detecting academic dishonesty during the examination process.

A. Live Online Proctoring

For high-stakes exams and critical certifications, live (human) proctoring is expected to oversee the entire exam, from authentication to test completion. Real-time on-screen support; immediate exam intervention is required.

B. Automated Proctoring

Online automated proctoring requires use of AI technology to monitor students during exams while ensuring the integrity through the use of web cameras and screen monitoring software.

III.3 Technical Requirements

The Proctoring Solution is expected to meet the following requirements.

A. Monitoring Process

1. Provide a detailed description of the following processes:
 - Pre-test Authentication (verifying student identities)
 - Scheduling and Managing Exams
 - Student Registration (including exam instructions)
 - Data Security (during exams)
 - Real-time Live Proctoring
 - Automated Proctoring
 - Recording and Viewing Exams (by faculty)
 - Violations (algorithms to detect and capture aberrant behavior)
 - End-to-End Security (active restriction of students' computers)
 - Post-exam Auditing
 - Content Protection
 - ADA Assistance
 - Other Advanced Monitoring Features
2. Provide a description of the methods used to ensure integrity of exams, exam passwords, and the testing environment (both the student's location and access to online materials during the exam). These methods should include visual and auditory observation.

3. Provide a description of your actionable plan to intervene in an exam where the integrity of the exam has been compromised.
4. Provide a description of your quality assurance processes to validate the proctor's results before submitting the results to the faculty.
5. Provide a mechanism for a faculty member to share any video evidence of cheating, either by downloading clips, streaming online, or some other similar mechanism should they need to take a student before a review board. Note: Recorded sessions should be available for five years unless available for download.
6. Provide a description of mechanisms for protection of faculty content.
7. Provide a description of how students are prevented from copying, pasting, and printing during exams.
8. Provide a description of exam durations being offered.
9. How are student accommodations verified, provided, and monitored?
10. Will the Solution be able to be used at off-campus premises (testing centers)?

B. Software/Hardware

Proposals should specify all software and hardware requirements such as computing graphics, RAM, and storage capacity. The Proctoring Solution must be compatible with all current operating systems and must be entirely browser-based and support all current versions of popular browsers (i.e., Firefox, Chrome, and Safari). The Proctoring Solution must have been implemented in a higher education environment for more than two years, and must provide a smooth workflow process for administration, faculty and students. It must be customizable with university logos. The Proctoring Solution must be [IMS Global Certified](#).

1. Software/Hardware – Provide a detailed description of the following features:
 - Proctoring Solution Platform
 - Hosting options
 - LMS integrations
 - Publisher Platform integrations
 - Data Centers (locations)
 - Third-party or subcontractor partnerships or involvement
 - System scalability
 - System redundancy and availability
 - Backup and recovery strategy
 - Disaster recovery, testing and business continuity plans
2. Data – Provide a detailed description of the following features:
 - Data encryption in transit and at rest
 - Security – data access and protection
 - Data breaches
 - Ownership of data
 - Termination of services; what happens to the data?
 - Restrictions on amount of data stored on the proposed solution

3. Security – Provide a detailed description of the following features:

- Restrictions on number of users accessing the proposed solution
- Student Privacy
- Security-related policies and procedures to which the Offeror's employees are required to adhere
- Web usability and ADA compliant accessibility of the proposed solution
- Proctoring tools must be IMS Global Certified

Note: Offerors may increase their liability by creating educational records and keeping them on file permanently on external servers. If student recordings are kept on a cloud server it may pose a higher risk of violating [FERPA](#). Offerors may not subcontract labor to a third-party as this may violate FERPA.

C. Technical and Customer Support

Provide a detailed description of the following:

- How is training provided to LMS staff, distance education services staff, faculty and students? Are ongoing training resources such as user documentation, how-to videos, and step-by-step instructions readily available in formats that allow for easy dissemination on institution's website, by e-mail, or by hard copy?
- Technical support for faculty, staff, and students
- Technologies required on devices being used by students (i.e., web cam, microphone, etc.)
- Support of devices, operating systems, and web browsers
- Third-party integrations
- Active Directory
- Customer Support Operations (assistance for users with difficulties accessing or using the solution, account manager's role)
- Available ordering methods – online ordering, order tracking, search options, order history

III.4. Reporting Needs

Provide a description and samples of available data reports. Do they include the length of exams, number of exams, list of students registered? Are customized reports available?

Section IV Information Required from Suppliers

IV.1 Required Information

Technical Proposals are to be straightforward, clear, concise and specific to the information requested. 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.

A. General

1. State the Supplier's understanding of the solution being requested by this RFP.
2. Include a narrative response that summarizes the key features and competitive advantages of the proposed solution that make it stand out from competing solutions.

B. Qualifications and Experience

1. Company

Include a brief history and description of the company, including the number of years in business and any ownership structure or management structure. Discuss how the firm's overall experience demonstrates its ability to successfully provide the solution.

2. Experience

Describe your organization's experience (including number of years in operation) as it pertains to providing a Proctoring Solution for higher education institutions. Submit three detailed case histories that demonstrate the breadth, depth and creativity of the solution that your firm can provide to the State System. At least one case history must be of a higher education institution (a state system is highly preferred). Provide a description of any industry best practices your firm utilizes. Include any industry awards your firm received.

3. References

Provide references from three of your clients from the past five years for services that are similar in scope, size and complexity to the Solution described in this RFP. At least one of these client references should preferably be from a higher education institution. Provide the following information for each client: client name and address; time period in which work was performed; and a short description of the work performed.

C. Technical Requirements

Provide a response to the requirements of Section III.3 including detailed descriptions of the Supplier's ability and proven success and expertise to provide a Proctoring Solution, its understanding of higher education entities, partnering plans, etc.

D. Value-Added Services

Describe in detail any value-added services that the Supplier can provide. This includes but is not limited to competitive advantages, efficiencies, and optional services distinct from the main technical requirements.

IV.2 Technical Proposal Format

- A. Proposals are to be straightforward, clear, concise, and specific to the information requested.
- B. While Offerors 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 RFP is strongly discouraged. Attach any supplemental information as an appendix to the Technical Proposal.
- C. It is the responsibility of all Offerors to examine the entire RFP package, to seek clarification of any item or requirement that may not be clear, and to check all of their responses for accuracy prior to submitting a proposal.
- D. Offerors are responsible for ensuring receipt of, and acknowledging, all addenda to this RFP in all Technical Proposals.
- E. All proposals must be properly marked and submitted via the State System's [eProcurement Exchange](#) by the Submission Date/Time listed in Section I.3 of this RFP.
- F. Include a detailed response to Appendix C, Exhibit A, OMNIA Partners Response for National Cooperative contract via the State System's [eProcurement Exchange](#) by the Submission Date/Time listed in Section I.3 of this RFP. Responses should highlight experience, demonstrate a strong national presence, describe how offeror will educate its national sales force about the contract, describe how products and services will be distributed nationwide, include a plan for marketing the products and services nationwide, and describe how volume will be tracked and reported to OMNIA Partners.
- G. The successful Offeror will be required to sign Appendix C, Exhibit B, OMNIA Partners Administration Agreement. Offerors should have any reviews required to sign the document prior to submitting a response. Offeror's response should include any proposed exceptions to the OMNIA Partners Administration Agreement.

IV.3 Cost Proposal Format

- A. Complete and submit Appendix B, Cost Proposal Form.
- B. The Cost Proposal Form is an Excel document that contains two tabs: (1) Instructions, and (2) Pricing.
- C. **All cost information must be kept separate and apart from the technical portion of the proposal.** Absolutely no pricing can appear anywhere in the Technical Proposal, including technical proposal appendices, SLAs, sample documents, etc.
- D. Prices proposed in the Offeror's response will be valid for a minimum of one year effective from the start of the contract.
- E. Offerors' proposals must describe how future price increases will be minimized and capped and how both increases and decreases will be passed on to the State System.
- F. Offerors must explain the proposed process to implement price changes.
- G. In addition to decreasing prices for the balance of the Contract term due to a change in market conditions, Awarded Offeror may conduct sales promotions involving price

reductions for a specified lesser period. Awarded Offeror may offer Participating Agencies competitive pricing which is lower than the not-to-exceed price set forth at any time during the Contract term and such lower pricing shall not be applied as a global price reduction under the Contract.

IV.4 **How to Submit an Online Proposal**

Log on to the State System's [eProcurement Exchange](#) and select the Bids tab. Click the link to the applicable solicitation and follow the directions at the Response tab.

IV.5 **What to Submit with the Proposal**

Folder #1: Technical Proposal

1. Submit your Technical Proposal as either an Adobe or a Word document. *
2. Include any relevant information as an appendix to the Technical Proposal (including samples) as an Adobe or Word document.
3. Name the documents as *Company Name Technical Proposal RFP Number*.
4. If submitting multiple documents, create a zip file.

Folder #2: Cost Proposal

1. Submit Appendix B, Cost Proposal Form as an Excel document. *
2. Name the document as *Company Name Cost Proposal RFP Number*.

Folder #3: Other Documents

1. If applicable, submit any User Agreements, Service Level Agreements, Click Through Agreements, etc., which the State System may be expected to sign. *
2. Name the documents as *Company Name Document Name RFP Number*.
3. If submitting multiple documents, create a zip file.

Upload the documents at the State System's [eProcurement Exchange](#) as shown at the Response tab.

*All documents must be renderable (able to browse, search, print, and edit). File names may not contain the following invalid characters: ;:~/><"|).

Section V Criteria for Selection

V.1 Evaluation of Proposals

All proposals will be reviewed and evaluated by a committee of qualified State System personnel (Proposal Evaluation Committee). The Proposal Evaluation Committee will recommend for selection the proposals that most closely meet the requirements of this RFP and satisfy the State System's needs.

- A. Responses will be evaluated first for responsiveness and thereafter for content. The Issuing Office will make award to the selected Offeror(s) based on the recommendation of the Proposal Evaluation Committee.
- B. If a response does not reasonably and substantially conform to all the terms and conditions in this solicitation, or if it requests unreasonable exceptions, it may be considered nonresponsive.
- C. While cost will be weighted heavily, it will not be the deciding factor in the selection process. The process of competitive negotiation (being used in this RFP) should not be confused with the different process of competitive sealed bidding. The latter process is used where goods/services being procured can be described precisely, and price is the determinative factor. With competitive negotiation (RFP), price is not required to be the determinative factor, although it may be, and the State System has the flexibility it needs to negotiate with Offerors to arrive at a mutually agreeable relationship.
- D. Experiences with the State System and entities that evaluation committee members represent may be taken into consideration when evaluating qualifications and experience.
- E. Recommendation of award will be based on the proposals that most closely meet the requirements of the RFP and satisfy the State System's objectives. A responsive Technical Proposal must achieve a minimum of 75 percent of the available technical points.

V.2 Evaluation Criteria

The following areas of consideration will be used in determining award:

- A. **Demonstrated Understanding of the State System's Requirements.** Refers to the Offeror's understanding of the State System's needs that generated the RFP, of the State System's objectives in asking for the solution, and of the nature and scope of the work involved.
- B. **Company Qualifications/Experience.** Includes competence and experience of the firm and its proposed resources. This includes the experience, expertise, and resources of the company and its personnel to meet the State System's objectives. A list of at least three projects in which the respondent has been directly involved that are comparable to the scope of work outlined herein must be provided.
- C. **Work Plan.** Refers to whether or not the Offeror's approach for assisting the State System responds to the written specifications and requirements of the RFP, and meets the State System's objectives. Of equal importance is whether the approach is completely responsive to all written specifications and requirements contained in the RFP.

- D. **References.** Refers to the references where a similar solution has been provided; especially to other higher education institutions.
- E. **Value-Added Services.** Includes but is not limited to competitive advantages, efficiencies, and optional services distinct from the main technical requirements.
- F. **Cost.** The State System desires the best pricing offered for the solution being requested. While this area will be weighted, it will not necessarily be the deciding factor in the selection process.

V.3 **Scoring Criteria**

- A. **Technical.** The Issuing Office has established the weight for the Technical criterion for this RFP as 67%. Evaluation will be based on selection criteria as per Part V.2, Evaluation Criteria.
- B. **Cost.** The Issuing Office has established the weight for the Cost criterion for this RFP as 33% of the total points. The Cost criterion is rated by giving the proposal with the lowest total cost the maximum number of Cost points available. The remaining proposals are rated as a percentage against this maximum. Note: Cost submittals will not be opened if an Offeror's technical score does not meet or exceed 75% of the total available technical points.