

## Request for Proposals

RFP TITLE: Online Program Management

RFP # 946184

Issue Date: 1/26/2018

Due Date: 2/20/2018

# **SECTION 1 – INTRODUCTION**

**1. Purpose of the RFP**

The Haslam College of Business Graduate & Executive Education division is seeking to retain an Online Program Management (OPM) firm to support the development and management of an online Master of Science in Supply Chain Management (MSSCM\_O) program. The program is currently in the planning approval phase with an anticipated start date of August 2019.

**2. RFP Communications   
  
Communication about this solicitation with employees or officials of the University of Tennessee other than the Solicitation Coordinator listed below may result in disqualification from this procurement process. The university has exclusive discretion in making this determination.**

All inquiries must be received by five business days before the solicitation closes. Individual questions will not be answered directly to the submitter. All material questions submitted shall be responded to through the ESM electronic bidding system as a written amendment. Any oral communications shall be considered unofficial and non-binding. Only the University’s official, written responses shall be considered binding. It is the respondent’s responsibility to ensure that written questions have been received and to check with the electronic bidding system to see if any amendments have been issued.

The University of Tennessee

Procurement Services

Solicitation Coordinator: Brad New

Phone: 865-974-3108

Email: bnew@tennessee.edu

**3. Term**

The university intends to award this to the successful respondent(s) for:

For the period of 3 years from the date of award. At the University’s discretion and under the same terms and conditions, the resulting contract may be extended annually for up to 5 additional 12-month periods upon written mutual agreement by authorized officials of the University and the supplier.

It is anticipated that the contract will start on June 1, 2018

Either party may terminate the agreement by providing 120 days written notice to the other party.

**4. Number of Awards**

The university intends to award this solicitation to one respondent unless the university deems it to be in their best interest to make the award to a smaller or larger number of respondents. The university will have sole discretion over this decision.

**5. Extension of the Award**

Other university departments, agencies with the State of Tennessee and other Tennessee public universities may also purchase goods and/or services from this award, if the winning respondent is agreeable. It should be noted that these entities are not required to use this agreement. If any them elect to participate under the terms and conditions of this resulting award, the University of Tennessee reserves the right to re-negotiate favorable incentive, and cost terms with the successful supplier that are reflective of the additional volume. Note: The offer to extend the award to these other entities is at the discretion of the winning respondent and they should not be extended if it would affect your ability to offer the most favorable prices and terms to The University of Tennessee.

**6. Non-Exclusive**

Although it is the university’s hope that most departments will procure items from this award, this is **NOT** a solicitation for an exclusive agreement and departments will still have the option of procuring items from other suppliers in accordance with our purchasing policies. The university does not guarantee that all purchases for the products and/or services available under this contract will be made exclusively from the respondent.

7. Schedule – Note the University reserves the right to change these dates. All times are Eastern

|  |  |
| --- | --- |
| **Release date** | 1/26/2018 |
| **Pre-Proposal conference** | NONE |
| **SOLICIATION DUE DATE: All proposals must be submitted by this date/time** | 2/20/2018 |
| **Presentations** | TBA |
| **Cost proposals open** | 3/16/2018 |
| **Notice of an Intent to Award** | 3/20/2018 |
| **Effective Date of the Agreement** | 6/1/2018 |

**SECTION TWO - INSTRUCTIONS AND EVALUATION CRITERIA**

**1. Assistance to Respondents with a Disability**

In the event that a respondent has a disability, the University will make reasonable accommodation to allow them to participate provided that they contact the Solicitation Coordinator no later than ten days before the proposal deadline.

**2. Proposal Submission**.

Proposals must be submitted electronically through the University’s electronic procurement system with ESM Solutions before the due date outline in the schedule above and in accordance with these directions:

1. Respondents shall submit separate line items for a technical proposal and one-line item for a financial proposal.
2. No Pricing: Respondents must not include any cost/pricing information in the Technical Proposal. Inclusion of rebate, financial incentives, or cost information in the Technical Proposal may make the entire Proposal non-responsive. The university has exclusive discretion in making this decision.
3. ESM Solutions fields: The University’s electronic procurement portal by ESM Solutions requires respondents to enter a price before a response can be submitted. Respondents must enter $0.01 in their Response Dollar Summary. This amount will not be considered by the University when evaluating technical responses. You will also be asked to fill in a manufacturer and part number, enter “NA” in both of these fields.

It is understood and agreed that all proposals shall remain firm for a period of at least 120 calendar days from the notice of the intent to award. Late bids will rejected.

**3. Confidential Information**Any proprietary or confidential materials contained in the proposal will be subject to the Tennessee Public Records Act, TCA 10-7-503. All responses, inquiries, or correspondence relating to or in reference to this solicitation, and all other documentation submitted by the respondents will become the property of the University when received. All proposal material submitted and evaluation documents will remain confidential, as provided by law, until after the University announces the notice of intent to award to the successful respondent. **The university will not agree to provide advance notice of disclosure and placing confidential notices on documents is meaningless.** After the notice to award, all materials submitted are open for inspection.

**4. Proposal Preparation Costs**

The university will not pay any costs in the preparation or submission of a proposal. These costs are the responsibility of the respondent.   
 **5. Withdrawal of Proposals**

A submitted proposal may be withdrawn by sending a written request to the Solicitation Coordinator before the solicitation due date. Proposals may be withdrawn and resubmitted in the same manner, if done prior to the submission deadline. Withdrawals or modifications offered in any other manner will not be considered.

**6. Acceptance and Rejection** **of Proposals**

The university may accept or reject any proposals that, in its opinion, is in the best interests of the university. The university may re-solicit proposals, or to continue with the current supplier for these services. The university may also waive minor variances or immaterial defects in a response. The university may also accept any item in the bid, unless otherwise specified by the responder.

**7. Evaluation Process**

**A. Mandatory and Technical Evaluations**

UT’s Procurement Services will review proposals and may eliminate from further consideration those which fail to meet the mandatory qualifications, if any. All proposals that meet the mandatory requirements shall have their technical proposals evaluated and scored by an evaluation committee (committee). The committee will be appointed by the university. After the technical proposals have been evaluated and scored, the scoring committee may select the highest scoring respondent(s) to invite for a presentation. The university will decide how many to invite. Respondents not invited for a presentation, have been eliminated from initial consideration. If all other respondents are later rejected by the university, it may then reconsider respondent not invited to a presentation. Upon completion of the presentations the scoring committee will re-evaluate and rescore points from the respondent’s technical response.

**B. Cost Evaluations**

The cost proposal will not be shared with the committee or evaluated until after the Technical Proposals have been scored by the committee. Procurement services will then score the cost proposals. The cost scores will then be combined with the committee’s technical scoring to identify the rank of the respondents.

**8. SCORES**

The process being used will not rely on price as the sole determining factor in selection. Scores will be calculated based on the following table.

|  |  |
| --- | --- |
|  | **Points** |
| **Technical Proposal** | **700** |
| **Cost Proposal** | **300** |
| **Total** | **1000** |

**10. Award**

This solicitation does not commit the university to make an award or to procure or contract for the articles of goods or services described in this solicitation. The University will make an award that the University determines to be in its best interest; this might result in a situation where the University does not award to the respondent offering the lowest cost, or to a respondent other than the highest-scoring respondent. The University reserves the right to negotiate terms and alter the specifications with the with the highest scoring respondent, however, if they are unable to reach mutually agreeable terms and conditions, the University reserves the right to reject the proposal and negotiate terms of an agreement with the next highest scoring respondent.

If the agreement with the successful respondent is terminated for any reason prior to the agreement termination date, the university may elect to substitute the next highest scoring respondent, if they are willing to honor the prices in their initial proposal.

A Purchasing Department of the University of Tennessee is the only office authorized to award a purchase order for the required services.

**11. Notice of Intent to Award**

After the evaluation process is completed, all respondents responding to the solicitation will be sent a notification indicating the university’s intention to award to the successful respondent.

# **Section THREE- TECHNICAL ReQUIREMENTS**

**1. Instructions**

Responses should be numbered to correspond to the numbers for each item listed below. Pertinent supplemental information should be referenced and included as attachments. In the event your attachments are too large to attach in ESM, please contact the Solicitation Coordinator. If the respondent cannot fully satisfy a requirement, an explanation must be provided. Failure to provide a response to every question or request will be interpreted by the university as an inability of the respondent to provide the requested product, service or function and may result in your submission being eliminated.

**A. General Qualifications and Experience**

The response must be in the exact order of each line item listed below. If your proposal is not in this format or does not include all of the listed items, it may be eliminated. As part of the review process, the university may require written clarification of the information submitted.

| **Item Ref.** | **General Qualifications & Experience Items** |
| --- | --- |
| **A.1** | Detail the name, e-mail address, mailing address, telephone number of the person the university should contact regarding the response. |
| **A.2** | Describe the Respondent’s form of business (*i.e*., individual, sole proprietor, corporation, non-profit corporation, partnership, limited liability company) and business location (physical location or domicile). |
| **A.3** | Detail the number of years the Respondent has been in business and how long they have been providing the goods or services required by this solicitation. |
| **A.4** | Describe the Respondent’s number of employees, client base, and location of offices. |
| **A.5** | Provide a statement of whether there have been any mergers, acquisitions, or change of control of the Respondent within the last 10 years. If so, include an explanation providing relevant details. |
| **A.6** | Provide a brief, descriptive statement detailing evidence of the Respondent’s ability to deliver the goods or services sought under this RFP (*e.g*., prior experience, training, certifications, resources, program and quality management systems, *etc*.). |
| **A.7** | Provide a narrative description of the proposed project team, its members, and organizational structure along with an organizational chart identifying the key people who will be assigned to deliver the goods or services required by this RFP. |
| **A.8** | Provide a personnel roster listing the names of key people who the Respondent will assign to meet the Respondent’s requirements under this solicitation along with the estimated number of hours that each individual will devote to that performance. Follow the personnel roster with a resume for each of the people listed. The resumes must detail the individual’s title, education, current position with the Respondent, and employment history. |
| **A.9** | Provide a statement of whether the Respondent intends to use subcontractors to meet the Respondent’s requirements of any contract awarded pursuant to this solicitation and if so, detail:  (a) the names of the subcontractors along with the contact person, mailing address, telephone number, and e-mail address for each;  (b) a description of the scope and portions of the goods each subcontractor involved in the delivery of goods or performance of the services each subcontractor will perform; and  (c) a statement specifying that each proposed subcontractor has expressly assented to being proposed as a subcontractor in the Respondent’s response. |
| **A.10** | Provide documentation of the Respondent’s commitment to diversity and indicate if they are registered with the Governor’s Office of Diversity Business Enterprise (Go-DBE). Please visit the Go-DBE website at <https://tn.diversitysoftware.com/FrontEnd/StartCertification.asp?TN=tn&XID=9265>  for more information. |
| **A.11** | Provide a statement of whether or not the Respondent has any current contracts with the university or has completed any contracts with the State of Tennessee, The University of Tennessee or Tennessee Board of Regents schools within the previous five (5) year period. If so, provide the details of these agreements. |
| **A.12** | List any addition information that may assist the committee in evaluating your proposal. |
| **A.13** | List any requirements by the university if you are awarded this solicitation? |
| **A.14** | Provide details of any litigation, or claims filed against you or your company that would negatively impact your company’s performance under an agreement resulting from this solicitation. Also, disclose any past criminal offences, civil proceedings, debarments, suspensions or other action that would negatively impact your performance under an agreement resulting from this solicitation. |

**B. Technical Approach**

| **Item Ref.** | **Technical Approach** |
| --- | --- |
| **B.1.** | Providean executive summary of the technical proposal that will give the evaluation committee a broad understanding of the entire proposal. Illustrates the Respondent’s understanding of the university’s requirements and project schedule. |
| **B.2.** | Providea narrative that illustrates how the Respondent will complete the scope of services, accomplish required objectives, and meet the university’s project schedule. |
| **B.3.** | Providea narrative that illustrates how the Respondent will manage the project, ensure completion of the scope of services, and accomplish required objectives within the university’s project schedule. |
| **B.4** | Describe all deliverables in detail including deadlines, service requirements, etc. |
| **B.5** | Discuss how the pricing will be verified and reports that will be provided |

**C. Technical Requirements**

The desired Scope of Services must include:

1. Provide online program management (OPM) services for a new Master of Science in Supply Chain Management program. Required services include:
   1. Overall program management for the scope of services provided, including the assignment of an individual who will serve as the primary point of contact with the University;
   2. Development of the program marketing strategy and materials in consultation with the University;
   3. Execution of the marketing strategy for the program including management of any contractors used;
   4. Recruitment of students to the program to the point where the applicant has a fully completed file in the University’s CollegeNet software which is ready for an admission decision from the university;
   5. Student support and retention services to meet a retention goal of 90% from program start to completion;
   6. Elective course development services to include instructional design, technical support, creative and design services for individual courses.
2. Provide detail on the structure of how these services would be delivered including:
   1. Account management structure including percentage of each full-time employee’s time dedicated to the University’s account;
   2. Detail for specifically which services would be subcontracted to other firms and details about these subcontractors. The University reserves the right to approve the use and selection of subcontractors.
3. Provide detail on how transparency would be provided to the University for activities performed on its behalf including:
   1. Details regarding any subcontractors used, including contact names, and contractual arrangements;
   2. Marketing spend amounts and channels; success of each type of marketing including analysis of the sources of applicants;
   3. Detailed spend by category (Development of Marketing Collateral, Marketing Spend, Recruiting, etc), including a clear and complete accounting of Proposer margin;
   4. Reporting on student retention activities including any actions the University can take to improve retention.
4. Provide information on whether the University would have the option to take on internal management of portions of the scope should they so choose during the contract (including the optional 12-month extentions after the initial 3-year term).
5. Provide a summary of your business including the full sprectrum of services offered.  Defend your organization’s ability to offer these services to the University of Tennessee including a documented history of performing services of a similar scope, scale, and complexity.
6. Describe up to five current client relationships of a similar nature.  Detail, as best you can without divulging competitive information, your experience with other clients of similar scope clearly identifying the term and scope of each relationship.
7. Please provide background on the financial health and viability of your company.  Are there any factors of which you are aware that might prevent you from successfully completing the terms of the contract?

**D. Student Demand Projections**

The Proposer needs to clearly show class size commitments beginning in August 2019 and for each term thereafter. Ideal program size would be a minimum of 35 in the first year (Fall 2019) and growing to a steady state of 150 students per year with three annual intakes (Spring, Summer, Fall). Projected marketing expenditures should align with a plan designed to deliver enrollment of the projected size as proposed in the separately attached cost proposal.

**E. References**

Provide at least three references, preferably from higher education institutions, for which the same services are being utilized. Include, at a minimum, the following:

* Company/School/Business name
* Contact name
* Phone number
* E-mail address
* Brief description of the scope, length, volume and status of the business relationship

References may be contacted at any time during this solicitation.

**SECTION FOUR – COST PROPOSAL**

**1. – Cost of Goods or Services**

The cost response must be in US dollars and must include all possible costs to the university. The maximum points possible for the cost proposal are \_\_\_. The proposal with the lowest price gets the total maximum points. Procurement Services will calculate the costs scores based on the following formula:

Cost Score= ((Lowest price amount from all proposals)/ (other proposal price being evaluated)) x maximum number of points.

**\*\*\* The University’s preference is a fee for service solution with minimal or no ongoing margins or other expenses\*\*\***

**Financial Proposal**

Proposers are required to complete the attached cost worksheet and provide a complete financial proforma in Excel format with details of revenue/expense assumptions and formulas included (e.g., full transparency). This proforma should, at a minimum, include the initial 3-year term and the five 12-month extension periods as allowed by the contract.

**Contract Structure, Fees, and Margin**

Proposers need to clearly detail all costs and fees paid to the Proposer or other firms. Any margin or contingencies should be clearly detailed and not lumped with expense items. The proposal should also detail residual revenues (margin) expected to accrue to the University for this program in all terms offered. The University should be able to end the contract after the initial term without any additional expenses, payments, or hurdles; the Provider shall turn over all leads and a fully transparent view of program details including marketing, recruiting, a detailed account of actual spend/Provider margin, and program management at any point during the contract.