



**REQUEST FOR PROPOSAL
No. JK170142P**

Housing Management Software System

PROPOSAL DUE DATE AND TIME:
July 23, 2014 (3:00 PM, PT)

OSU Procurement, Contracts and Materials Management Offices are open Monday through Friday 8:00 am-12:00 noon and 1:00 pm-5:00 pm.
Offices are closed during the 12:00 noon-1:00 pm lunch hour.

SUBMITTAL LOCATION:

Oregon State University
Procurement, Contracts and Materials Management
644 SW 13th Avenue
Corvallis, Oregon 97333

1.0 GENERAL

1.01 SCHEDULE OF EVENTS

- Issue Date June 30, 2014
- Deadline for Requests for Clarification or Change July 8, 2014 (3:00 pm, PT)
- Proposal Due Date and Time July 23, 2014 (3:00 pm, PT)

This Schedule of Events is subject to change. Any changes will be made through the issuance of Written Addenda.

1.02 PRE-PROPOSAL CONFERENCE

A Pre-Proposal Conference will not be held.

1.03 ISSUING OFFICE

The Procurement, Contracts and Materials Management (PCMM) department of Oregon State University ("OSU") is the issuing office and is the sole point of contact for this Request for Proposal. Address all concerns or questions regarding this Request for Proposal to the Administrative Contact identified below.

1.04 ADMINISTRATIVE CONTACT

Name: Jennifer Koehne
Title: Purchasing Analyst
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1.05 DEFINITIONS

As used in this Request for Proposal, the terms set forth below are defined as follows:

- a. "Addenda" means an addition to, deletion from, a material change in, or general interest explanation of the Request for Proposal.
- b. "Exhibits" means those documents which are attached to and incorporated as part of the Request for Proposal.
- c. "Proposal" means an offer, binding on the Proposer and submitted in response to a Request for Proposal.
- d. "Proposer" means an entity that submits a Proposal in response to a Request for Proposal.
- e. "Proposal Due Date and Time" means the date and time specified in the Request for Proposal as the deadline for submitting Proposals.
- f. "Request for Proposal" (RFP) means a Solicitation Document to obtain Written, competitive Proposals to be used as a basis for making an acquisition or entering into a Contract when price will not necessarily be the predominant award criteria.
- g. "Responsible" means an entity that demonstrates their ability to perform satisfactorily under a Contract by meeting the applicable standards of responsibility outlined in OAR 580-061-0130.
- h. "Responsive" means a Proposal that has substantially complied in all material respects with the criteria outlined in the Request for Proposal.
- i. "Written or Writing" means letters, characters, and symbols that are intended to represent or convey particular ideas or meanings and are made in electronic form or inscribed on paper by hand, print, type, or other method of impression.

2.0 INTRODUCTION AND BACKGROUND

2.01 INTRODUCTION

Procurement, Contracts and Materials Management is seeking Responsive Responsible Proposers to submit Proposals for either an on-site or hosted Housing Management Software System Solution.

2.02 BACKGROUND

University Housing and Dining Services (UHDS) at Oregon State University recognizes the importance of learning both in and out of the classroom, and supports the concept of education as an individual as well as a community experience. UHDS strives to provide students, faculty, staff, and guests with safe, economical, convenient, and comfortable living and dining options, and the department works to maintain the highest educational and service standards. UHDS houses over 4,800 students and offers a variety of living and dining options in 15 residence halls, 107 family housing apartments, and 3 dining centers. UHDS is an auxiliary enterprise which is funded solely by customers who use our services and receives no State or General fund allocation.

UHDS is currently utilizing an open source system called Tillikum that was created in-house to handle all our application and booking needs. UHDS is now looking for an information system that will allow it to maintain a high level of innovation in services offered to students. This information system will consist of an online application and contract process, online room selection and changes for new and returning students, an interactive web and mobile-friendly portal for student engagement, and a comprehensive conferences module.

2.03 OREGON STATE UNIVERSITY

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. OSU is a member of the Oregon University System and one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. OSU is also the only Oregon institution to hold the Carnegie Foundation's top ranking for research universities, recognition of the depth and quality of OSU's graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, OSU has a presence in almost every one of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. OSU offers undergraduate, masters and doctoral degrees through 12 academic colleges enrolling more than 26,000 students from every county in Oregon, every state in the country and more than 90 nations.

3.0 STATEMENT OF WORK

3.01 SAMPLE CONTRACT

A sample contract containing contractual terms and conditions is included at Exhibit A. All terms and conditions are expressly authorized for negotiation.

3.02 STATEMENT OF WORK

UHDS is looking for a dynamic housing information system (hosted on-site or by Proposer) to be implemented in the fall of 2014. The system will support the following: Residents/people, billing, room bookings, meal plan tracking, housing application and student self-room selection, automatic allocation, student portal, apartment management, conference housing, reporting, programmatic interface (API), facilities/room configurations, customer support tracking, room key tracking, check-in/out capabilities, and other services that allow for ease of navigating the residential experience on campus.

System Functions and Specifications

Proposer shall detail their proposed solution's ability to provide or perform each of the functions or specifications identified in this section. Indicate whether the function is provided in the current configuration of the proposed solution or the current release of any application included with Proposer's solution, with enough detail to understand how the function is performed. If the item will be incorporated into a future configuration or release, indicate such, and be as specific as possible as to which future release and the expected availability. If the functionality is only available at an additional cost, please so indicate. The purpose of this section is to provide information and necessary requirements that will best serve the University's current and future needs. It is not intended to preclude or limit respondents in any way from offering additional creative and economic solutions.

All functions and specifications and requirements in this section are categorized as either minimum or preferred. All specifications indicated by the letter **(M)** minimum specifications, and those indicated by the letter **(P)** are preferred and optional. Proposers are permitted under the RFP specifications to propose additional optional items and features, but must meet all the requirements designated as minimum in order to be considered a responsive Proposer.

Section 1— General requirements

Deployment (M)

System will be deployed in one of the following deployment models. Proposals may include more than one deployment alternative.

Option A) A complete Residential Housing Management System deployed as an externally hosted SaaS (Software as a Service). Proposal must include the total cost of deployment and ownership that includes, but is not limited to, hardware, software licensing and maintenance, support, training, and an estimate of the staffing resources needed to effectively deploy and support system. Proposal must include documentation on security (i.e. physical and virtual access control to their facilities and infrastructure), data (i.e. backup, retention, and ownership), etc.

Option B) A complete Residential Housing and Property Management System to be installed on-site. Proposal must include the total cost of deployment and ownership that includes, but is not limited to, hardware, software licensing and maintenance, support, training, and an estimate of the staffing resources needed to effectively deploy and support system.

Mobile Application (P) Describe your Mobile Application component and provide some examples of its usage.

System Training (M) Training for the proposed system must be available from the proposer for a period not less than one year from the date of purchase. Available training must include, but is not limited to, end-user training for all major functional areas of the system, and System Administrator training for all administrative aspects of the system.

User Groups & Conferences

- Describe user discussion groups and how they function. **(P)**
- If there is an annual user conference provide details: location, time of year, cost, format, etc. **(P)**

Section 2— Technical Requirements, Security, Support & Maintenance

Technical Requirements

- Describe the overall system architecture. Include internal and external communication paths (including 3rd party applications) and indicate the security used for each path. **(M)**
- Describe hardware and software requirements for the proposed system along with any sizing assumptions made to arrive at those requirements. **(M)**
- Describe supported hardware and software platforms. **(M)**
- Describe the scalability of the system in order to support events that may put a high load on the system (e.g. room selection, yearly check-in). **(M)**
- Describe the estimated availability of the system, including which components may be unavailable, when, and for what reason. Describe estimated downtime per year (e.g. for maintenance, backups). Describe any relevant policies (e.g. Service Level Agreements) that are in place to cover unforeseen downtime. **(P)**
- Describe any resources required of the University in order to perform regular maintenance of the system (e.g. backups, upgrades). **(M)**
- Describe any capability of your system to be changed or enhanced by the University (e.g. report creation) and estimated resources required to perform these tasks. **(M)**
- If University staff may make changes to any aspect of the system, describe the tools used to build and maintain those components of the system. **(P)**
- Describe the system capabilities and options for the backup and restoration of University data. **(M)**
- Describe the client operating system and browser requirements for use of your system. List any additional client-side software required for development or management of your system. If the software is to be installed on client hardware, does regular use of the system require the user to have elevated operating system privileges? **(M)**
- Describe the supported database platforms. Include any changes apart from the default installation settings for a given database platform that may be required to run the system. **(M)**
- Programmatic interface (API) & Integration **(M)**
- Describe the methods by which OSU can gain access to the data in order to support development of 3rd party systems. **(M)**
- Does the data access method support full read and write access to all customer data? If not, what is unsupported, and what is the roadmap for the system to support such access methods in the future? **(P)**
- How is the data access authenticated and authorized? **(M)**
 - Describe how the system generates events when changes occur, and how the events are programmatically accessible (e.g. via an API or “web hook”). Describe supported integration with OSU’s existing systems listed in the background statement. **(P)**
- Describe technical reporting capabilities. Include the handling of application, operational, content, access, and storage metrics and the method for obtaining them (e.g. command line tools, SNMP, GUI?). **(M)**

Security

- Describe how users and processes are authenticated before gaining access to data and services. Include authentication between components and between the product and external services.
 - Describe support for CAS, Shibboleth, and/or LDAP authentication. **(M)**
 - If applicable, if there are any LDAP schema requirements in order to authorize users, please describe the schema requirements. **(P)**
- Describe how and where any sensitive data, including authentication information, is stored on clients, servers, and participating external devices. Is it cryptographically protected? If so, provide details on cryptographic protocols, procedures, and key protection. **(M)**

- Describe how application authorization is managed. The system should provide security to ensure that only authorized individuals have access to particular functions such as adding or updating housing data. This control should support read/write, read only, or no access. **(M)**
 - If 3rd party tools can be used to manage authorization (AD, Grouper, etc.) please describe. **(P)**
- Describe auditing capabilities of the system. Recorded data should include, but is not limited to, the change field, field value before change, field value after change, date, time, and user-id associated with the update, deletion, or insertion. **(M)**
- If applicable, provide up to date, signed documentation that the offered solution and Contractor is compliant with all PCI DSS and PADSS requirements. **(M)**
- If a hosted solution is an option for this project, the proposer must meet the OSU's hosted application requirements <http://oregonstate.edu/fa/manuals/is/204> and fill out OSU's Security Features Questionnaire (Appendix E). **(M)**

Support & Maintenance

Because consistency and stability of the operating environment and rapid correction of system failures are critical to Oregon State University, consideration will be given to the amount and extent of hardware and software maintenance coverage and to the quality of maintenance.

- Describe your customer & technical support processes. **(M)**
- Describe your "escalation" procedure. **(M)**
- Describe how you will support a client on the west coast of the United States in the Pacific time zone during standard business hours of 8:00 am - 5:00 pm; Monday through Friday. **(M)**
- What support is available after business hours? Weekends? **(P)**
- Describe capabilities for remote support and indicate what action shall be taken by the University to take advantage of that service. **(M)**
- Describe the maintenance philosophy including frequency of updates, approach to completing updates, and model for obtaining them. **(M)**
- Describe procedure for handling upgrades. Specify how often upgrades are made to the application software and how "patches" and "fixes" to the systems are handled.
- Describe all responsibilities of both the Contractor and Oregon State University in the isolation and diagnosis of system failures. **(M)**
- Describe the nature of any continuing research and development performed by the manufacturer to detect and correct problems in the system design, to improve efficiency, and/or to enhance the capabilities of the system proposed. **(M)**

Accessibility

The application must meet OSU's requirements for accessibility.

- Any web facing content needs to meet OSU's Web Content Accessibility Guidelines: <http://oregonstate.edu/accessibility/WCAG2.0> **(M)**
- Any software client (non-web) application needs to meet OSU's Software Accessibility Guidelines: <http://oregonstate.edu/accessibility/software> **(M)**
- Describe how your client applications meet or do not meet the above requirements. If the requirements are not currently met in the application describe how they will be met in the future, and the timeline for meeting the requirement. **(M)**

Section 3— System Functionality Requirements

System Requirements

The system must be dynamic and support integration from Banner SIS as well as user-input data. The data must also be archivable after a certain amount of time. Please describe the features, functionality and ease of use of the proposed Housing Software System **(M)**. Include how the clients can do the following:

- Create user accounts; create/edit group permissions, and deactivate/delete/archive user accounts **(M)**
 - Create customizable read only views/screens
 - Read only views of building occupants for hall staff
- Archive old data/Search functionality: Does the solution allow the end user to search for a resident by name, ID number, application number, or application period? **(M)**
- Manually create a housing application or contract **(M)**
- Define fields within the application **(M)**
- Create multiple unique applications that can be active simultaneously **(P)**
- Configure and customize screens, reports, forms/applications **(M)**
- Modify fields (for both end users and administrators) within the system **(M)**
- Add customizable fields for users **(M)**
 - Are there associated costs?
- Compatibility with all web browsers **(M)**
- Compatibility with mobile devices **(M)**

Person Management

UHDS manages many facet of the user experience in residence. **(M)** Ability to add users to the system via import from Banner SIS or create users not affiliated with the University (i.e. conference guests or scholars). Please describe how your system supports the following:

- Interfaces with Banner SIS data to import demographics **(M)**
- Support “confidentiality” and FERPA by clearly stating to users that a user is marked confidential **(M)**
- Support user defined preferred or “nickname” **(P)**
- Support banning a user from housing **(M)**
- Support user images **(M)**
- Support multiple addresses and email addresses **(M)**
- Missing person contact information **(M)**
- Emergency contact information **(M)**
- Multiple phone types **(P)**
- Assigning “tags” to users (i.e.: ADA, RA, etc.) **(P)**
- Unlimited customizable fields **(P)**
- Adding “other” occupants (partners, children, ADA, caregiver) **(M)**

Room Management

UHDS assigns or “books” space in a variety of dynamic ways. We book traditional residents by bed and academic year (September to June) and assign rates by term within that booking (fall, winter, spring). We also book by the unit for duration of stay: i.e. 12 month contract for apartments or family homestay. We also book by block of time for international student programs, which does not include any associated rates for the rooms. Please describe the booking options for rooms or units. **(M)**

Online Housing application: UHDS uses an online application platform for all application types **(M)**. Please describe how your system handles the following:

- Integrated application eligibility with demographic information **(M)**

- Customizable online application: follow the order of information needed as we request and dynamic for each application period **(P)**
- Tracking of student preference types for buildings and room types **(M)**
- Integrate with social media platforms **(P)**
- Allow residents to apply for a living-learning community via supplemental questionnaire **(P)**
- Allow residents to self-select roommates based on a variety of pre-determined questions **(M)**
- Allow residents to request an exemption to living on campus based on pre-determined qualifications **(M)**
- Allow residents to request an exemption to living on campus based on a supplemental questionnaire. **(M)**

Room selection

UHDS allows new and returning fall students to select their own rooms **(M)**. Please describe how your system supports the following:

- Timeline for selection dynamic to eligible applications (i.e. new and current students select at different times) **(M)**
- Rooms/wings/floors/buildings can be limited based on applicant “tags” **(P)**
- Gender inclusive option where gender of students not required to match **(M)**
- Inviting roommates/suitemates **(M)**
- Email/SMS notifications throughout the process **(M)**
 - selected space
 - invited roommate
 - broken roommate relationship
 - contract signature
- real-time integration with housing information system for availability of space **(M)**
- Support of electronic contract signature either before or after room is selected **(M)**
- Support of online prepayment for housing (application fee) **(M)**
- Support of room selection based on university demographics (i.e. major) for living-learning programs **(M)**
- Support use of lottery for selection timeline **(M)**

Automatic assignment allocation

Please describe how your system assigns students to spaces if they do not select their own room **(M)**. Include responses to the following:

- Booking of space by applicant type **(M)**
- Dynamic eligibility criteria: **(M)**
 - application date **(M)**
 - Living-learning programs **(M)**
- Supports confirmed roommates being assigned together if space allows **(M)**
- Suite assignments must be dynamic: unless gender is not enforced, the first person in the suite sets the gender **(M)**

Room changes

UHDS allows residents to change their rooms throughout the assignment period. Please describe how your system supports the following:

- Allow students to request a room change via the web portal **(M)**
- Allow users to perform a room swap between residents **(M)**
- Allow users to edit current bookings **(M)**
- Allow users to specify booking start and end dates at any point: i.e.: booking dates are: 2013/09/15 - 2014/06/13, and the rate bookings associated are: 2013/09/20 - 2013/12/13; 2014/01/04 - 2014/03/23; and 2014/04/01 - 2014/06/01 **(M)**

Student web portal

- CAS login authentication for the student **(M)**
- real-time integration with housing information system **(M)**
- Progress of application status is clear at all times **(M)**
- Mobile friendly **(M)**

Meal Plan Management

On-campus residents in traditional residence halls are required to have a meal plan. Please describe how your system allows for the following:

- Ability to assign with a room booking based on fixed term date ranges **(M)**
- Ability to modify or change meal plan within a fixed term date range **(M)**
- Ability to export user defined data from multiple modules (room, profile, dining, etc.) for import to 3rd party system (ID card database, excel, outlook, etc.) **(M)**
- Ability to import hourly dining plan balance information from a 3rd party system and display to resident or other authorized end user **(M)**
- Ability for a resident to request a meal plan change via the web portal **(P)**

Apartment Management

UHDS has 107 apartment units and 30 Homestay units that are booked on either a monthly (usually for the 12 month fiscal year) basis or for a fixed period of time **(M)**. Please describe how your system would support the following:

- Annual contract and bookings for apartment-style housing option **(M)**.
- Integrated waitlist functionality **(M)**.
- Track all occupants of the apartment **(M)**.
- Track laundry cards **(P)**.
- Track parking permits **(P)**.
- Track host information for Homestay units **(M)**.

Billing

UHDS bills currently with the following rate types: nightly, daily, weekly, monthly, pre-set range (i.e. academic term) with proration capabilities. Please describe billing options for rooms or units **(M)**. Please describe the ability of users to generate invoices for conference guests (both group and individual) **(P)**.

Please describe how your system supports the following features:

- Rates can vary independently of assigned room, but may be influenced by the assigned room (e.g. the rate may default to an appropriate rate for the assigned space, but the user may override the system default). **(M)**
- Integration of charges with (export to) Banner FIS. **(M)**
- Ability to charge on an ad-hoc basis for things like: damages, rekeys, cleaning, etc. **(M)**

Automated messaging

- The system must provide ability to email student occupants with user-defined templates. **(P)**
- The system should provide ability to track email open-rate, click-through rates and generate reports for email campaigns as well as contact points with individual students. **(P)**
- The system should provide SMS Text Messaging as an optional form of electronic communication in conjunction with E-mail, Mail-Merge, etc. **(P)**

Conference Services

UHDS offers a comprehensive residential conferences program which includes housing academic scholars (non-students who are usually here to perform research as a guest of an academic department). Please describe how your system would support the following functionality:

- Customizable online space reservation requests: follow the order of information needed as determined by UHDS. **(M)**
- Mass booking by group or person. **(M)**
- Supports online bill pay by group or individual. **(M)**
- Supports partial payment options for clients, including a deposit. **(M)**
- Ability to add non-students to the system for scholar housing. **(M)**
- Real-time integration with housing information system room configurations for availability of space. **(M)**
- Store conference contact information and associated tasks/milestones. **(M)**
- Manage reservations of meeting rooms and event spaces. **(P)**
- Calendar view options -- view room and event reservations by building or across multiple buildings. **(M)**
- Ability to "check in" and "checkout" guests, real time information. **(P)**
- Ability to upload rosters of participants. **(M)**
- Store and report on conference meal needs: including meal start and end times, meal counts, locations, varied meal types and pricing (all you care to eat vs. a la carte). **(M)**

Operations

UHDS Supports a number of other features to provide a holistic customer service experience for residents. Please discuss how your system would support the following features:

- Customer Support Log. **(P)**
 - Track all correspondence with a student: email, phone calls, parent inquiries
 - include SMS messaging
 - Tag functionality
 - reportability based on tags
 - add multiple people to a ticket
 - ability to add multi-media files (i.e. voice mail)
- Room key tracking and checkout. **(P)**
 - Tied to occupants of a room
 - Email notifications for past due keys
 - Reportable on frequency of key checkouts
 - Audit ability for key tracking
- Quick check-in/out functionality **(M)**
 - Swipe university student id card for checking in and out of space and tracking of time/date stamp of the swipe for reporting purposes
 - Dynamic reporting of check in and out
- Room condition reporting **(P)**
 - Ability for assigned residents to input the condition of their room via web portal
 - Ability for staff to track reports of room condition
 - Option for residents to request maintenance via web portal
- Package Tracking **(P)**
 - Ability for users to log packages for residents including labeling system
 - Email notifications to residents of packages
 - Ability to audit packages remaining in system
- Electronic Roommate Agreement **(P)**
 - Ability for all residents of a room or unit to agree to terms of how they will interact with each other and the space.

- Submissions sent to specific users (i.e. resident director, operations coordinator) for tracking and follow up purposes
- Ability to set deadlines for submissions

Room configurations

Please describe how your system manages room or facility type configurations **(M)**. How do you support the following functionality?

- Ability to group rooms into suites/wings/floors/buildings/areas. **(M)**
 - Can rooms be associated with programs like academic wings or quiet wings? **(P)**
- Ability to easily change room types/capacity. **(M)**
 - I.E. Room is typically a double occupancy room for the academic year, but single occupancy for conference season.
- Track previous occupancy and vacancy information. **(M)**
- Ability to easily change room number/name. **(P)**
- Support use of room features/tags: I.E: ADA, staff, etc. **(M)**
- Room key codes attached to rooms. **(P)**

Reports

Describe the tools utilized and the process for creating, writing, and printing reports.

- Provide a list of all “canned” or system-provided reports already available to users, including a short description of each. Please also include a sample of several reports as examples. **(M)**
 - Can these reports be modified? **(P)**

How does your system handle the following functionality regarding reporting?

- Customizable reporting including use of customized fields in reporting. **(M)**
- Ability to write and save reports. **(M)**
- No 3rd party vendor required for reporting. **(M)**
- Ability to integrate with user dashboards. **(P)**

Please provide examples of the following report types (or their equivalents in your system). **(P)**

- Applicants and Applications
 - All Applicant List (with application status)
 - Applicant by specific attribute (i.e., demographics, class standing, etc.)
 - Individual Applicant Detail
 - Application Cancellations
 - All Applicant with Disability List
 - Returning Residents Application
 - Early Arrival List
 - Contract status
- Room/Facility Configurations
 - Facility configurations by date and capacity
 - Facility configurations with billing rates
 - Open room reports
- People
 - Sortable rosters
 - Room assignment check-in/outs
 - Occupancy counts by building
 - Cancellation reports by date

4.0 PROPOSER QUALIFICATIONS

4.01 MINIMUM QUALIFICATIONS

In order to qualify as a Responsive Proposer, the Proposer needs to meet the minimum qualifications below.

- a. Proposer must have multiple years of experience providing a housing management system to colleges and universities with five (5) years minimum experience providing services to university housing departments with over 4000 beds.
- b. Proposer must be able to implement the system within a four to six week time period from award of contract.
- c. Proposer must show verification they can provide support at a minimum from 8:00 am to 5:00 pm Pacific Time.
- d. Proposer must show that software complies or will comply in the future with current ADA codes and regulations.

4.02 PREFERRED QUALIFICATIONS

OSU will award additional points for Proposers able to meet the preferred qualifications below.

- a. Proposers that can offer both hosted and on-site solutions.
- b. Proposers that can offer a strategic relationship with OSU that may include but not be limited to any of the following:
 - o Pricing concessions for being on a preferred client referral list or as a reference customer program site.
 - o Pricing concessions for the right to utilize OSU in strategic marketing materials.
- c. Proposers that can offer client manuals, help systems, and how-to documents that can be modified by UHDS.

5.0 REQUIRED SUBMITTALS

5.01 QUANTITY OF PROPOSAL

Submit one (1) electronic or hard copy via any of the methods detailed in Section 7.07 SUBMISSION. Proposals should contain original signatures on any pages where a signature is required (in the case of electronic submissions, scans of such pages should be included). Proposals should contain the submittals listed in this section below.

5.02 REQUIRED SUBMITTALS

It is the Proposer's sole responsibility to submit information in fulfillment of the requirements of this Request for Proposal. If pertinent information or required submittals are not included within the Proposal, it may cause the Proposal to be rejected or have an adverse impact on evaluation.

Proposers must submit the following information:

- Description of how the goods or services specifically satisfy the statement of work in section 3.
- Detailed information about how the Proposer meets the minimum qualifications described in section 4.
 - o Provide 3 references for universities that have 4000 or more beds in which you have successfully implemented your system. (Proposers can use Exhibit C for this purpose)
 - o Provide a project plan to show how you can meet the four to six week implementation.
 - o Provide your customer support model that shows customer support will be available during standard business hours in the Pacific Time Zone.
 - o Provide detail to show your company and product are ADA Compliant; include detail around testing for adherence to current accessibility guidelines and standards.

- Detailed information about how the Proposer meets the preferred qualifications described in section 4.
 - Provide pricing for both hosted and on-site options if available.
 - Provide details about the type of strategic relationship you would be able to offer OSU including detail around any price concessions/discounts you are willing to offer in exchange for using OSU as a reference site for potential new customers and in marketing efforts.
 - Describe the types of client manuals, help systems and how-to documents that are available to the customer and how they can be modified. Detail if your company has any client-to-client support or list-serve options.
- Exhibit B: Certifications fully completed.
- Exhibit C: References fully completed.
- Exhibit D: Complete and itemized pricing of the goods or services requested.
- Exhibit E: Security Features Questionnaire (**Only required if proposing a hosted solution**). Attach additional pages as needed.

6.0 EVALUATION

6.01 EVALUATION

The stages of review and evaluation are as follows:

- a. **Determination of Responsiveness:**
 OSU will first review all Proposals to determine Responsiveness. Proposals that do not comply with the instructions or are incomplete may be deemed non-Responsive. Written notice will be sent to Proposers whose Proposal is deemed non-Responsive identifying the reason. A Proposer has the right to appeal the decision pursuant to OAR 580-061-130(5)(a).

- b. **First Stage Evaluation:**
 Those Proposals determined to be Responsive will be evaluated using the required submittals. Proposals will be scored based on the evaluation criteria listed below in section 6.03. Scores will be used to determine Proposer's within a competitive range. The competitive range will be made of Proposers whose individual scores, when viewed together, form a group of the highest ranked Proposers above a natural break in the scores.

 OSU may award after the first stage evaluation to the highest ranked Proposer without moving on to the second stage evaluation. If this option is selected, Written notice of intent to award the Contract to the highest ranked Proposer will be provided to all Responsive Proposers, or an award may be made directly without notice of intent in those instances of a single Responsive Proposer.

- c. **Second Stage Evaluation:**
 If award is not made after the first stage evaluation, OSU may choose any of the following methods in which to proceed:
 - i. Issue a Written invitation to Proposers within the competitive range requesting an interview, presentation, site visit or any other evaluative method that is relevant to the goods or services solicited in the Request for Proposal. Written invitations will contain the evaluation criteria and scoring that will be used by the evaluation committee.

 - ii. Engage in oral or Written discussions with and receive best and final Proposals from all Proposers in the Competitive Range or all Proposers submitting Responsive Proposals. Discussions may be conducted for the following purposes:
 - Informing Proposers of deficiencies in their initial Proposals;
 - Notifying Proposers of parts of their Proposals for which OSU would like additional information; or
 - Otherwise allowing Proposers to develop revised Proposals that will allow OSU to obtain the best Proposal based on the requirements set forth in this Request for Proposal.

The conditions, terms, or price of the Proposal may be altered or otherwise changed during the course of the discussions provided the changes are within the scope of the Request for Proposal. Best and final Proposals will be scored based on the evaluation criteria listed below in section 6.03.

Points awarded in the first stage evaluation will not be carried to the second stage evaluation. Contract will be awarded to the Proposer who in OSU's opinion, best meets the requirements and qualifications of the RFP and OSU's needs.

d. Additional Stages of Evaluation:

If after completion of the second stage of evaluation, an award is not made, OSU may add another stage of evaluation using any of the methods outlined in the second stage evaluation above.

6.02 EVALUATION CRITERIA

Points will be given in each criteria and a total score will be determined. The maximum points available for each criterion are identified below.

<u>Evaluation Criteria</u>	<u>Points</u>
Proposal relative to the Statement of Work	55
Proposer's qualifications relative to the preferred qualifications	10
Price of the goods or services	35
Total	100

6.03 NEGOTIATIONS

OSU may commence serial negotiations with the highest ranked Proposer or commence simultaneous negotiations with all eligible Proposers. OSU may negotiate:

- a. The statement of Work;
- b. The Contract price as it is affected by negotiating the statement of Work; and
- c. Any other terms and conditions determined by OSU in its sole discretion to be reasonably related to those expressly authorized for negotiation.

Terms and conditions within the sample contract that are unrelated to the statement of work or Contract price may be negotiated after award, but before legal review or execution of the Contract.

6.04 INVESTIGATION OF REFERENCES

OSU reserves the right to investigate and to consider the references and the past performance of any Proposer with respect to such things as its performance or provision of similar goods or services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, subcontractors, and workers. OSU further reserves the right to consider past performance, historical information and facts, whether gained from the Proposal, Proposer interviews, references, OSU or any other source in the evaluation process. OSU may postpone the award or execution of the Contract after the announcement of the notice of intent to award in order to complete its investigation.

7.0 INSTRUCTIONS TO PROPOSERS

7.01 APPLICABLE STATUTES AND RULES

This Request for Proposal is subject to the applicable provisions and requirements of the Oregon Revised Statutes, Oregon Administrative Rules, and OSU Policies and Procedures.

7.02 MANUFACTURER'S NAMES AND APPROVED EQUIVALENTS

Unless qualified by the provision "NO SUBSTITUTE" any manufacturers' names, trade name, brand names, information and/or catalogue numbers listed in a specification are for information and not intended to limit competition. Proposers may offer any brand for which they are an authorized representative, which meets or exceeds the specification for any item(s). If proposals are based on equivalent products, indicate in the proposal form the manufacturers' name and number. Proposers shall submit with their proposal, sketches, and descriptive literature, and/or complete specifications. Reference to literature submitted with a previous proposal will not satisfy this provision. Proposers shall also explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. Proposals that do not comply with these requirements are subject to rejection. Proposals lacking any written indication of intent to provide an alternate brand will be received and considered in complete compliance with the specification as listed in the RFP.

7.03 REQUESTS FOR CLARIFICATION OR CHANGE

Requests for clarification or change of the Request for Proposal must be in Writing and received by the Administrative Contact no later than the Deadline for Request for Clarification or Change as specified in the Schedule of Events. Such requests for clarification or change must include the reason for the Proposer's request. OSU will consider all timely requests and, if acceptable to OSU, amend the Request for Proposal by issuing an Addendum. Envelopes, e-mails or faxes containing requests must be clearly marked as a Request for Clarification or Change and include the RFP Number and Title.

7.04 ADDENDA

Only documents issued as Written Addenda by PCMM serve to change the Request for Proposal in any way. No other direction received by the Proposer, written or verbal, serves to change the Request for Proposal. PCMM will notify potential Proposers through publication of the Addenda on the OUS procurement website. If you have received a Request for Proposal you are advised to consult the OUS procurement website, prior to Proposal submittal, to ensure that you have not missed any Addenda. Proposers are not required to return Addenda with their Proposal. However, Proposers are responsible for obtaining and incorporating any changes made by the Addendum into their Proposal. Failure to do so may, in effect, make the Proposal non-Responsive, which may cause the Proposal to be rejected.

7.05 PREPARATION AND SIGNATURE

All Required Submittals must be Written or prepared in ink and signed in ink by an authorized representative with authority to bind the Proposer. Signature certifies that the Proposer has read, fully understands, and agrees to be bound by the Request for Proposal and all Exhibits and Addenda to the Request for Proposal.

7.06 PUBLIC RECORD

Upon completion of the Request for Proposal process, information in your Proposal will become subject records under the Oregon Public Records Law. Only those items considered a "trade secret" under ORS 192.501(2), may be exempt from disclosure. If a Proposal contains what the Proposer considers a "trade secret" the Proposer must mark each sheet of information as such. Only bona fide trade secrets may be exempt and only if public interest does not require disclosure.

7.07 SUBMISSION

Proposals must be received in the PCMM office no later than the Proposal Due Date and Time; it is the Proposer's responsibility to ensure that the Proposal is received prior to the Proposal Due Date and Time indicated in this RFP, regardless of the method used to submit the Proposal. Proposals may be submitted via the following method(s):

- 1) Electronic copy in PDF format included as attachment(s) in an e-mail sent to bids@oregonstate.edu. The e-mail subject line should contain the RFP No. and RFP title. Only those Proposals received at this e-mail address by the Due Date and Time will be considered Responsive; do not e-mail a copy of the Proposal to any other e-mail address. Proposals submitted directly to the Administrative Contact e-mail address will NOT be considered Responsive. It is highly recommended that the Proposer confirms receipt of the email with the Administrative Contact noted above or by calling 541-737-4261. The Administrative Contact may open the e-mail to confirm receipt but will NOT verify the integrity of the attachment(s), answer questions related to the content of the Proposal, or address the overall Responsiveness of the Proposal.
- 2) Hard copy in a sealed package or envelope dropped off in person or delivered to the submittal location listed on the Request for Proposal cover sheet. The package or envelope should be addressed to the Administrative Contact. It is highly recommended that the Proposer confirms receipt of the Proposal with the Administrative Contact prior to the Proposal Due Date and Time.

All Proposals, including those submitted through electronic methods (if allowed), must contain Written signatures indicating intent to be bound by the offer. If the Proposer submits multiple versions of the Proposal via different methods and does not explicitly direct OSU as to which version to use, OSU will determine which version of the Proposal will be used for evaluation.

7.08 MODIFICATION

Prior to submittal, Proposers should initial modifications or erasures in ink by the person signing the Proposal. After submittal but prior to the Proposal Due Date and Time, Proposals may be modified by submitting a Written notice indicating the modifications and a statement that the modification amends and supersedes the prior Proposal. After the Proposal Due Date and Time, Proposers may not modify their Proposal.

7.09 WITHDRAWALS

A Proposer may withdraw their Proposal by submitting a Written notice to the Administrative Contact identified in this Request for Proposal prior to the Proposal Due Date and Time. The Written notice must be on the Proposer's letterhead and signed by an authorized representative of the Proposer. The Proposer, or authorized representative of the Proposer, may also withdraw their Proposal in person prior to the Proposal Due Date and Time, upon presentation of appropriate identification and evidence of authority to withdraw the Proposal satisfactory to OSU.

7.10 LATE SUBMITTALS

Proposals and Written notices of modification or withdrawal must be received no later than the Proposal Due Date and Time (in the case of electronic submissions, the time/date stamp of the email received at the PCMM office must be no later than the Proposal Due Date and Time). OSU may not accept or consider late Proposals, modifications, or withdrawals except as permitted in OAR 580-061-0120. Sole responsibility rests with the Proposer to ensure OSU's receipt of its Proposal prior to the Proposal Due Date and Time. OSU shall not be responsible for any delays or misdeliveries caused by common carriers or by transmission errors, malfunctions, or electronic delays. Any risks associated with physical delivery or electronic transmission of the Proposal are borne by the Proposer.

7.11 PROPOSAL OPENING

Proposals will be opened immediately following the Proposal Due Date and Time at the Submittal Location. Proposer may attend the Proposal opening. Only the names of the Proposers submitting Proposals will be announced. No other information regarding the content of the Proposals will be available.

7.12 PROPOSALS ARE OFFERS

The Proposal is the Proposer's offer to enter into a Contract pursuant to the terms and conditions specified in the Request for Proposal, its Exhibits, and Addenda. The offer is binding on the Proposer for one hundred twenty (120) days. OSU's award of the Contract constitutes acceptance of the offer and binds the Proposer. The Proposal must be a complete offer and fully Responsive to the Request for Proposal.

7.13 CONTINGENT PROPOSALS

Proposer shall not make its Proposal contingent upon OSU's acceptance of specifications or contract terms that conflict with or are in addition to those in the Request for Proposal, its Exhibits, or Addenda.

7.14 RIGHT TO REJECT

OSU may reject, in whole or in part, any Proposal not in compliance with the Request for Proposal, Exhibits, or Addenda, if upon OSU's Written finding that it is in the public interest to do so. OSU may reject all Proposals for good cause, if upon OSU's Written finding that it is in the public interest to do so. Notification of rejection of all Proposals, along with the good cause justification and finding of public interest, will be sent to all who submitted a Proposal.

7.15 AWARDS

OSU reserves the right to make award(s) by individual item, group of items, all or none, or any combination thereof. OSU reserves the right to delete any item from the award when deemed to be in the best interest of OSU.

7.16 LEGAL REVIEW

Prior to execution of any Contract resulting from this Request for Proposal, the Contract may be reviewed by a qualified attorney for OSU pursuant to the applicable Oregon Revised Statutes and Oregon Administrative Rules. Legal review may result in changes to the terms and conditions specified in the Request for Proposal, Exhibits, and Addenda.

7.17 PROPOSAL RESULTS

A Written notice of intent to award will be issued to all Proposers. The Proposal file will be available for Proposer's review during the protest period at the PCMM Department. Proposers must make an appointment with the Administrative Contact to view the Proposal file. After the protest period, the file will be available by making a Public Records Request to OSU Office of General Counsel.

7.18 PROPOSAL PREPARATION COST

OSU is not liable for costs incurred by the Proposer during the Request for Proposal process.

7.19 PROPOSAL CANCELLATION

If a Request for Proposal is cancelled prior to the Proposal Due Date and Time, all Proposals that may have already been received will be returned to the Proposers. If a Request for Proposal is cancelled after the Proposal Due Date and Time or all Proposals are rejected, the Proposals received will be retained and become part of OSU's permanent Proposal file.

7.20 PROTEST OF CONTRACTOR SELECTION, CONTRACT AWARD

Any Proposer who feels adversely affected or aggrieved may submit a protest within three (3) business days after OSU issues a notice of intent to award a Contract. The protest must be clearly identified as a protest, identify the type and nature of the protest, and include the Request for Proposal number and title. The rules governing protests are at OAR 580-061-0145.

EXHIBIT A
TERMS AND CONDITIONS / SAMPLE CONTRACT

This Contract is between Oregon State University and its University Housing and Dining Services ("OSU"), and [Contractor's name] ("Contractor").

WHEREAS, OSU competitively solicited for the services outlined in this Contract under Request for Proposal number JK170142P entitled Housing Management Software System and Contractor was selected as the Proposer best able to provide this service; and

WHEREAS, Contractor understands the requirements for the services outlined in this Contract, and is willing and able to provide, in accordance with the terms of this Contract, the services;

NOW, THEREFORE, OSU and Contractor agree as follows:

1. CONTRACT TERM AND TERMINATION:

A. CONTRACT TERM.

This Contract is effective on the date of last signature and expires on (OPTION 1) [insert date]. (OPTION 2) the later of [insert date], or the date Contractor has completed all services in accordance with the requirements of this Contract, and the services have been accepted by OSU. (OPTION 1) OSU has the option to extend the term of this Contract for [insert number of renewals both spelled out and (number) format] additional [insert length of renewal terms both spelled out and (number) format] terms based on the current terms and conditions. OSU may exercise this option to extend by providing written notice to Contractor prior to the expiration of the Contract. (OPTION 2) This contract will automatically be extended for [insert number of renewals both spelled out and (number) format] additional [insert length of renewal terms both spelled out and (number) format] terms based on the current terms and conditions unless OSU, at its sole option, elects not to extend the Contract by providing written notice to Contractor prior to the expiration of the Contract.

B. TERMINATION.

This Contract may be terminated at any time by mutual consent of both parties or by OSU upon thirty (30) days' written notice. In addition, OSU may terminate this Contract at any time by written notice to Contractor if (a) Federal or state statutes, regulations or guidelines are modified or interpreted in such a way that the services are no longer allowable or appropriate for purchase under this Contract; (b) any license or certificate required by law or regulation to be held by the Contractor to provide the services required by this Contract is for any reason denied, revoked, or not renewed; or (c) OSU fails to receive funding, appropriations, allocations or other expenditure authority as contemplated by OSU's budget and OSU determines, in its assessment and ranking of the policy objectives explicit or implicit in OSU's budget, that it is necessary to terminate the Contract, or (d) if the OSU program for which this Contract was executed is abolished.

OSU may also terminate this Contract at any time by written notice for default (including breach of contract) if (a) Contractor fails to timely provide services or materials called for by this Contract; or (b) Contractor fails to perform any of the other provisions of this Contract, or so fails to pursue the work as to endanger performance of this Contract in accordance with its terms and conditions, and after receipt of written notice from OSU, fails to correct such failures within ten (10) days. Termination of this Contract under this Section or any other section is without prejudice to OSU's other rights and remedies.

C. REMEDIES FOR CONTRACTOR'S DEFAULT.

In the event Contractor is in default (which includes without limitation, incomplete services), OSU may, at its option, pursue any or all of the remedies available to it under this Contract and at law or in equity, including, but not limited to: (a) rejection of the services, (b) requiring Contractor to correct any defects without charge, (c) negotiation with Contractor to sell the services to OSU at a reduced price, (d) termination of the Contract, (e) withholding all moneys due for the services Contractor has failed to deliver within any scheduled completion dates or has performed inadequately or defectively, (f) initiation of an action or proceedings for damages, specific performance, or declaratory or injunctive relief, or (g) exercise of its right of set off. These remedies are cumulative to the extent the remedies are not inconsistent, and OSU may pursue any remedy or remedies singly, collectively, successively, or in any order whatsoever.

2. STATEMENT OF WORK:

A. REQUIRED SERVICES, DELIVERABLES AND DELIVERY SCHEDULE.

Contractor shall provide OSU with the following services during the Term of this Contract:

TO BE INSERTED AT A LATER DATE BASED ON AWARDED PROPOSAL

B. ACCEPTANCE OF SERVICES.

Services furnished under this Contract are subject to acceptance by OSU. If OSU finds services furnished to be incomplete or not in compliance with the Contract, OSU, at its sole discretion, may either reject the services, require Contractor to correct any defects without charge, or negotiate with Contractor to reduce the price, whichever OSU deems appropriate under the circumstances. If Contractor is unable or refuses to cure any defects within a time deemed reasonable by OSU, OSU may pursue any of the remedies for Contractor's default detailed in that Section above.

C. BUSINESS REVIEWS.

Contractor will participate in Business Reviews as requested by OSU Procurement, Contracts, and Materials Management. Business Reviews will be scheduled by the Contract Administrator in OSU Procurement, Contracts, and Materials Management and will include attendance by OSU representatives, and Contractor's Regional Representatives. The reviews may include discussion of Contract terms and conditions, work performed under the Contract, financial data, proposal of Contract improvements for increased service or lower costs, and any potential changes to the Contract.

3. COMPENSATION:

The total amount available for payment to Contractor and for authorized reimbursement to Contractor is **[\$insert total amount of contract]**.

A. METHOD OF PAYMENT FOR SERVICES.

TO BE INSERTED AT A LATER DATE BASED ON AWARDED PROPOSAL

B. BASIS OF PAYMENT FOR SERVICES.

TO BE INSERTED AT A LATER DATE BASED ON AWARDED PROPOSAL

C. EXPENSE REIMBURSEMENT.

OSU will not reimburse Contractor for any expenses under this Contract.

D. INVOICES AND PAYMENT TO CONTRACTOR.

Contractor shall send invoices to OSU for services completed and accepted by OSU. Contractor shall include in each invoice:

- a. The Contract number;
- b. A description of services performed, including the dates services were performed, all deliverables delivered during the period of the invoices, the rate(s) for services performed, and the total cost of services;
- c. Itemization and explanation of all expenses for which Contractor claims reimbursement authorized under this Contract;
- d. The total amount due and the payment remittance address.

Contractor shall send all invoices to OSU's Department Administrator or to the Department to which the services were provided if a Department Administrator is not specified.

OSU shall pay Contractor for services performed at the prices and rates specified herein. Contractor shall look solely to OSU for payment of all amounts OSU owes to Contractor. Payment of OSU contracts is normally made within 30-45 days following the date the invoice is received. After 45 days, Contractor may assess overdue account charges up to a maximum of two-thirds of one percent (2/3 of 1%) per month or eight percent (8%) per annum on the outstanding balance pursuant to ORS 293.462.

4. INSURANCE:

A. GENERAL LIABILITY INSURANCE.

Contractor shall obtain, at Contractor's expense, and keep in effect during the term of this Contract, Commercial General Liability Insurance, including Products and Completed Operations coverage, with minimum limits of \$2 Million per occurrence and \$4 Million aggregate. Such insurance policy is to be issued by an insurance company authorized to do business in the State of Oregon with an A.M. Best rating of at least A-VII, or such other insurance carrier approved in writing, in advance, by OSU. OSU and the Oregon University System, their officers, employees and agents shall be included as additional insured in said insurance policy.

B. PROFESSIONAL LIABILITY INSURANCE.

Contractor shall obtain, at Contractor's expense, and keep in effect during the term of this contract, Professional Liability Insurance. Coverage limits shall not be less than \$2,000,000 per occurrence.

C. AUTOMOBILE LIABILITY INSURANCE.

Contractor shall obtain, at Contractor's expense, and keep in effect during the term of this contract, Automobile Liability Insurance. This coverage can be provided by combining the Automobile Liability Insurance with the General Liability Insurance. Coverage limits shall not be less than \$2,000,000 combined single limit per occurrence.

D. PROPERTY INSURANCE.

The Contractor must maintain Property Insurance during the term of the Contract that covers all property used for Contract work and all Contractor-owned property that is stored at OSU.

E. PRIMARY COVERAGE.

Insurance carried by Contractor under this Contract shall be the primary coverage and OSU's insurance is excess and solely for damages or losses for which OSU is responsible.

F. WORKERS' COMPENSATION.

The Contractor, its subcontractors, if any, and all employers providing work, labor or materials under this Contract are subject employers under the Oregon Workers' Compensation law and shall comply with ORS 656.017, which requires them to provide workers' compensation coverage that satisfies Oregon law for all their subject workers, unless such employees are exempt under ORS 656.126.

G. CERTIFICATES OF INSURANCE.

As evidence of the insurance coverages required by this Contract, the Contractor shall furnish Certificate(s) of Insurance to the OSU Contract Administrator, upon request. The Certificate(s) will specify all of the parties who are Additional Insureds (or Loss Payees). Insurance coverages required under this Contract shall be obtained from acceptable insurance companies or entities. Contractor shall be financially responsible for all deductibles, self-insured retentions and/or self-insurance included hereunder.

H. NOTICE OF CANCELLATION OR CHANGE.

Contractor shall not cause or permit any cancellation, material change, potential exhaustion of aggregate limits or notice of intent not to renew insurance coverage(s) without 30 days' written notice from the Contractor or its insurer(s) to OSU's Contract Administrator. Any failure to comply with the reporting provisions of this insurance, except for the potential exhaustion of aggregate limits, shall not affect the coverage(s) provided to OSU.

5. INDEMNIFICATION:

A. INDEMNITY.

a. Contractor shall indemnify and hold harmless OSU, the Oregon State Board of Higher Education and their respective officers, board members, employees, agents and other representatives against claims, expenses, or losses: (i) that result from Contractor's negligence, wrongful acts or willful misconduct, or (ii) alleging Contractor's services, information or materials supplied by Contractor to OSU under this Contract, or OSU's use of any of the foregoing infringes on any patent, copyright, trade secret, trademark, or other proprietary right of a third party.

- b. OSU's right to receive indemnification under this Section is conditioned upon OSU giving reasonably prompt notice and assistance of any claim; provided however, that OSU's failure to provide notice and assistance does not limit OSU's right to indemnification except to the extent such failure or assistance materially affects Contractor's ability to defend the claim.
- c. Contractor's indemnification obligation under this Section includes but is not limited to all of OSU's expenses of litigation, court costs and reasonable attorney fees.

B. DEFENSE.

- a. Contractor shall have control of the defense with counsel reasonably acceptable to OSU, except that: (i) OSU may join the defense with its own counsel and at its own expense if OSU determines there is a conflict of interest or there is an important government principle at issue, and (ii) OSU'S consent is required for any settlement that requires OSU to pay any money, does not release OSU from all liability from the claim, or adversely affects OSU's interest.

6. LAWS AND POLICIES:

A. APPLICABLE LAW; JURISDICTION AND VENUE.

- a. The laws of the State of Oregon (without giving effect to its conflict of laws principles or laws) govern all matters arising out of or relating to the Contract, including, without limitation, its validity, interpretation, construction, performance or enforcement. Any party bringing a legal action or proceeding against the other party arising out of or relating to this Contract shall bring the legal action or proceeding in the Circuit Court of Oregon for Benton County.
- b. Notwithstanding paragraph (a), if a legal action or proceeding must be brought in a federal forum, the party shall bring the legal action or proceeding in the United States District Court for the District of Oregon. This paragraph does not authorize Contractor to bring a legal action or proceeding against OSU in a federal forum except to the extent Congress has validly abrogated OSU's sovereign immunity. This paragraph is also not a waiver by OSU of any form of immunity, including without limitation sovereign immunity and immunity based on the Eleventh Amendment to the United States Constitution.
- c. Except as set forth in paragraph (b), the parties consent to in personam jurisdiction in the above courts and waive any objection to venue and any objection that the forum is inconvenient.

B. COMPLIANCE WITH APPLICABLE LAWS AND POLICIES.

- a. The parties shall at all times comply with all applicable federal, state and local laws, regulations, executive orders and ordinances pertaining to their respective businesses, products or services, employment obligations, and the subject matter of this Contract. The parties shall at all times comply with all applicable policies of the Oregon University System and OSU, including without limitation any such laws or regulations regarding employment discrimination. If this Contract is being funded with federal funds, Contractor agrees to comply with all applicable federal contracting statutes, regulations and policies.
- b. Without limiting the generality of the foregoing, Contractor expressly agrees to comply with the following laws, regulations and executive orders to the extent they are applicable to the Contract: (i) Titles VI and VII of the Civil Rights Act of 1964, as amended; (ii) Paragraphs 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) ORS Chapter 659, as amended; (ix) the Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g; (x) the Health Insurance Portability and Accountability Act requirements noted in OAR 125-055-0115; (xi) the Oregon Consumer Identity Theft Protection Act, ORS 646A.600-646A.628; (xii) all regulations and administrative rules established pursuant to the foregoing laws; and (xiii) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations. These laws, regulations and executive orders are incorporated by reference herein to the extent that they are applicable to the Contract and required by law to be so incorporated.

C. **FEDERALLY REQUIRED PROVISIONS.**

- a. Equal Employment Opportunity – Contractor shall comply with E.O. 11246, "Equal Employment Opportunity," as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and as supplemented by regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."
- b. Rights to Inventions Made Under a Contract or Agreement – If this Contract is for the performance of experimental, developmental, or research work, the Federal Government and OSU have rights in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.
- c. Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.), as amended – If this Contract provides for payments in excess of \$100,000, Contractor shall comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251 et seq.). Violations shall be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
- d. Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) – Contractors who apply or bid for an contract of more than \$100,000 shall file a certification that it will not and has not used Federally appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, officer or employee of Congress, or an employee of a Member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Contractor shall require any subcontractor who applies or bids for subcontract in excess of \$100,000 to provide a similar certification to the next higher tier (Contractor or subcontractor as applicable). Each tier shall also disclose any lobbying with non-Federal funds in connection with obtaining any Federal award. Contractor or subcontractor must forward any disclosures from tier to tier up to OSU.
- e. Debarment and Suspension (E.O.s 12549 and 12689) - No contract shall be made to parties listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Nonprocurement Programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension." This list contains the names of parties debarred, suspended, or otherwise excluded by agencies, and contractors declared ineligible under statutory or regulatory authority other than E.O. 12549. If this Contract is in excess of the small purchase threshold, Contractor hereby certifies they are not listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Nonprocurement Programs.

D. **PUBLIC RECORDS LAW NOTICE.**

OSU advises Contractor that information OSU receives may be subject to public inspection under Oregon Public Records Law (ORS 192.410-192.505).

E. **SAFETY AND HEALTH REQUIREMENTS/HAZARD COMMUNICATION.**

Services supplied under this Contract shall comply with all federal Occupational Safety and Health Administration (OSHA) requirements and with all Oregon safety and health requirements, including those of the State of Oregon Workers' Compensation Division. Contractor shall notify OSU prior to using products containing hazardous chemicals to which OSU employees may be exposed. Products containing hazardous chemicals are those products defined by Oregon Administrative Rules, Chapter 437. Upon OSU's request, Contractor shall immediately provide Material Safety Data Sheets, as required by OAR 437-155-025, for the products subject to this provision.

F. **FIREARMS POLICY.**

The State Board of Higher Education has adopted a policy that prohibits Contractor and Contractor's employees, agents, and subcontractors from possessing firearms on Board-owned or Board-controlled property.

G. **PARKING.**

Contractors doing business on the OSU campus may be required to have a permit to park if utilizing restricted street parking or parking lots. Contractor parking permits may be obtained through OSU's Office of Transit & Parking Services.

H. **SEXUAL HARASSMENT POLICY.**

The State Board of Higher Education has adopted policies that prohibit sexual harassment of members of the OSU community and in keeping with those policies Contractor and Contractor's employees, agents, and subcontractors are prohibited from engaging in sexual harassment of members of the OSU community.

I. **SMOKING POLICY.**

OSU has adopted a policy that prohibits Contractor and Contractor's employees, agents, subcontractors from smoking on the OSU campus or other OSU owned property. The smoking prohibition includes all indoor and outdoor spaces.

J. **WEBSITE ACCESSIBILITY.**

If Contractor is designing or developing web page(s) for OSU under this Contract, Contractor shall design and develop (as applicable) the web page(s) in conformance with OSU's Policy on Information Technology Accessibility available at <http://oregonstate.edu/accessibility/ITpolicy>.

7. GENERAL TERMS AND CONDITIONS:

A. **ORDER OF PRECEDENCE.**

In the event of a conflict, all the terms and conditions of this Contract, its exhibits, and any amendments thereto supersede all terms and conditions on any forms used by the Contractor.

B. **NO THIRD PARTY BENEFICIARY.**

OSU and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third parties

C. **ASSIGNMENT/SUBCONTRACT/DELEGATION.**

Contractor shall not assign, subcontract, delegate or otherwise transfer any of its rights or obligations under this Contract, without the prior written approval of OSU. Any assignment of rights or delegation of duties is prohibited under this Section, whether by merger, consolidation, dissolution, operation of law or any other manner. Any purported assignment of rights or delegation of duties in violation of this Section is void. OSU's consent to delegation does not relieve Contractor of any of its performance obligations.

D. **WAIVER.**

No waiver of an obligation under this Contract is effective unless it is in writing and signed by the party granting the waiver. No failure or delay in exercising any right or remedy, or in requiring the satisfaction of any condition under this Contract operates as a waiver or estoppel of any right, remedy or condition.

E. **ACCESS TO RECORDS AND AUDIT.**

Contractor shall maintain accurate books, records, documents, and other evidence (collectively, "Records") following accounting procedures and practices sufficient to reflect properly all costs of whatever nature claimed to have been incurred and anticipated to be incurred in the performance of this Contract. Contractor shall permit OSU, the Oregon State Board of Higher Education, Oregon Secretary of State, the federal government, and their duly authorized representatives to have access to the Records that are directly pertinent to this Contract for the purpose of conducting an audit, or other examination, or for creating excerpts or transcripts. Contractor shall maintain Records for OSU's review for at least six years beyond the term of the Contract. Contractor shall promptly remedy any discrepancies involving deviation from the terms of this Contract and shall promptly reimburse OSU for any commitments or expenditures found by OSU to have been in excess of amounts authorized by OSU under this Contract.

OSU shall have the right to an independent third-party audit of the Contractor's records associated with or related to the goods or services provided for under this Contract. OSU may request an independent third-party audit no more than one time per calendar year. OSU will determine the time-period that will be the subject of the audit. However, the entire term of the Contract, including the original term and any subsequent renewals or extensions, may be the subject of the independent third-party audit at any time. Contractor shall bear the full cost of such independent third-party audit.

F. GOVERNMENT EMPLOYMENT STATUS.

Contractor certifies that either (a) it is not currently employed by OSU, Oregon University System, or the federal government; or (b) if Contractor is so employed, Contractor has fully disclosed to OSU in writing such employment status, is in full compliance with any statutes, regulation, and OSU, Oregon University System, or the federal government policies regarding employee contracting, and agrees to indemnify and hold harmless OSU for any failure by Contractor to comply with such statutes, regulations, or policies.

G. INDEPENDENT CONTRACTOR STATUS.

The services to be rendered under this Contract are those of an independent contractor. OSU reserves the right (a) to determine and modify the delivery schedule for the services and (b) to evaluate the quality of the services; however, OSU may not and will not control the means or manner of Contractor's performance. Contractor is responsible for determining the appropriate means and manner of performing the services. Contractor is not an officer, employee or agent of OSU as those terms are used in ORS 30.265. Contractor has no authority to act on behalf of OSU and shall not purport to make any representation, contract, or commitment on behalf of OSU.

H. NOTICE.

a. A party giving or making any notice, request, demand or other communication (each a "Notice") pursuant to this Contract shall give the Notice in writing and use one of the following methods of delivery: personal delivery, United States Postal Service Registered or Certified Mail (return receipt requested and postage prepaid), overnight courier (with all fees prepaid), facsimile or e-mail to the other party's address as listed on the signature page of this Contract. Notice to OSU is to be delivered to the Contract Administrator and Departmental Administrator except where this Contract expressly directs or permits delivery of Notice to a different Department.

b. Notice is effective: (i) if given by facsimile, upon receipt by the sending party of an appropriate facsimile confirmation; (ii) if given by e-mail, by confirmation of receipt by return e-mail, which is not satisfied by an automatically-generated message that the recipient is out of the office or otherwise unavailable; or (iii) if given by any other means, when delivered at the address specified in this Section.

OSU Contract Administrator and:
OSU PCMM
ATTN: JK170142P Contract Administrator
644 SW 13th Street
Corvallis, OR 97333
Telephone: (541) 737-4261
Fax: (541) 737-2170
E-mail: pacs@oregonstate.edu

OSU Departmental Administrator
[Name]
[Title]
[Address]
[City, State, Zip]
Telephone: [Phone Number]
Fax: [Fax Number]
E-mail: [E-Mail Address]

CONTRACTOR Contract Administrator
[Name]
[Title]
[Address]
[City, State, Zip]
Telephone: [Phone Number]
Fax: [Fax Number]
E-mail: [E-Mail Address]

I. OSU NAME AND TRADEMARK.

Contractor shall not identify this Contract, nor use OSU's names, trademarks, service marks, or other proprietary marks in any of Contractor's marketing material, advertising, press releases, publicity matters or other promotional materials without the prior written consent of OSU, which consent may be withheld in OSU's sole discretion.

J. RECYCLABLE PRODUCTS.

Contractors will use recyclable products to the maximum extent economically feasible in the performance of the Contract.

K. SALES AND USE TAXES.

OSU shall pay all applicable sales, excise, or use taxes in connection with this Contract. Invoices shall separately identify all such taxes and shall include either Contractor's sales tax or use tax permit number. Contractor shall be responsible for all other taxes, including taxes based upon Contractor's income. Contractor shall indemnify, defend, and hold harmless OSU from and against any interest, penalties, or other charges resulting from the non-payment or late payment of taxes or other charges for which Contractor failed to invoice OSU or which Contractor otherwise failed to pay in a timely manner.

L. FORCE MAJEURE.

Neither party is responsible for delay caused by an act or event that prevents the party from performing its obligations under this Contract where such cause is beyond the party's reasonable control and the nonperforming party has been unable to avoid or overcome the act or event by the exercise of due diligence. Such acts or events include without limitation fire, riot, acts of nature, terrorist acts, or other acts of political sabotage or war. Contractor shall make all reasonable efforts to remove or eliminate such a cause of delay and shall, upon cessation of the cause, diligently pursue performance of its obligations under this Contract. However, if delay due to a force majeure event continues for an unreasonable time, as determined by OSU, then OSU is entitled to terminate the Contract.

M. EXECUTION AND COUNTERPARTS.

This Contract may be executed by facsimile or PDF and in two or more counterparts, each of which shall be deemed an original and all of which together shall constitute one instrument.

N. SURVIVAL.

The terms and conditions of this Contract that by their sense and context are intended to survive termination or expiration hereof shall so survive.

O. SEVERABILITY.

If any provision of this Contract is determined to be invalid, illegal or unenforceable, the remaining provisions of this Contract remain in full force and effect if the essential terms and conditions of this Contract for both parties remain valid, legal and enforceable.

P. MERGER.

This Contract, including all documents referred to herein and attached hereto, constitutes the entire agreement between the parties and supersedes all prior representations, understanding and agreements between the parties. It is the complete and exclusive expression of the parties' agreement on the matters contained in this Contract. No amendment, consent, or waiver of terms of this Contract shall bind either party unless it is in writing and signed by authorized representatives of each of the parties. Any such amendment, consent, or waiver is effective only in the specific instance and for the specific purpose given.

8. CERTIFICATIONS AND SIGNATURES:

This Contract must be signed in ink by an authorized representative of Contractor. The undersigned certifies under penalty of perjury both individually and on behalf of Contractor that:

- A. The undersigned is a duly authorized representative of Contractor, has been authorized by Contractor to make all representations, attestations, and certifications contained in this Contract and to execute this Contract on behalf of Contractor and that this Contract, when executed and delivered, shall be a valid and binding obligation of Contractor enforceable in accordance with its terms;
- B. Contractor is not a contributing member of the Public Employees' Retirement System and will be responsible for any federal or state taxes applicable to payment under this Contract. Contractor will not, by virtue of this Contract, be eligible for federal Social Security, employment insurance, workers' compensation or the Public Employees' Retirement System, except as a self-employed individual.
- C. Pursuant to OAR 580-061-0030, Contractor has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts;
- D. Pursuant to ORS 305.385(6), Contractor, to the best of the person's knowledge, is not in violation of any tax laws described in 305.380(4).

Each of the parties has caused its duly authorized representative to execute this Contract on the date set forth in its respective signature block below.

CONTRACTOR:

Signature: _____

Date: _____

By: _____

Title: _____

OSU:

Signature: _____

Date: _____

By: _____

Title: _____

SAMPLE

**EXHIBIT B
CERTIFICATIONS**

By signature on this certification the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS

The undersigned hereby certifies under penalty of perjury that the undersigned is authorized to act on behalf of Proposer and that Proposer is, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321 and 323 and the elderly rental assistance program under ORS 310.630 to 310.706 and local taxes administered by the Department of Revenue under ORS 305.620.

SECTION II. AFFIRMATIVE ACTION

The undersigned hereby certifies that they have not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts, pursuant to OAR 580-061-0030 (3).

SECTION III. COMPLIANCE WITH SOLICITATION

The undersigned agrees and certifies that they:

1. Have read, fully understands and agrees to be bound by the Request for Proposal and all Exhibits and Addenda to the Request for Proposal; and
2. Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or Contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the Request for Proposal and the Contract; and
4. Has provided a correct Federal Employer Identification Number or Social Security Number with the Proposal.

SECTION IV. PERMISSIVE COOPERATIVE PROCUREMENTS

If Proposer is awarded a contract from this Request for Proposal, Proposer hereby (check one)

agrees

disagrees

to offer the resulting contractual terms and prices to other Oregon public institutions.

Authorized Signature: _____

Date: _____

Name (Type or Print): _____

Telephone:(____)_____

Title: _____

Fax:(____)_____

FEIN ID# or SSN# (required): _____

Email: _____

Company: _____

Address, City, State, Zip: _____

Construction Contractors Board (CCB) License Number (if applicable): _____

Business Designation (check one):

Corporation

Partnership

LLC

Sole Proprietorship

Non-Profit

**EXHIBIT C
REFERENCES**

REFERENCE 1

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

REFERENCE 2

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

REFERENCE 3

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

**EXHIBIT D
PRICING**

FILL OUT THE PRICING WORKSHEET BELOW FOR EACH SOLUTION YOU ARE PROPOSING- ONSITE AND/OR HOSTED.

One Time Costs- Year 1	Cost
Software/Licensing Costs	\$
3rd Party Software/Licensing Costs	\$
Hardware Costs (if on-site proposal)	\$
Set-up Costs (hardware, software and 3rd party products)	\$
Data Conversion Fees (if applicable)	\$
Implementation	\$
Training	\$
First Year Maintenance Costs	\$
Other (specify)	\$
Total One Time Costs Year 1	\$

Recurring Costs- Years 2-5	Cost
Annual Maintenance per Year	\$
Total Maintenance Costs Years 2-5 (Annual Maintenance Cost * 4 years)	\$

Maintenance Costs to be static for years 2-5

Professional Services/Consulting Fees	Cost
Per Hour Rate for additional professional services	\$

Additional Professional Fees to be contracted on an as needed basis.

Discounts- Strategic Partner, Contract Term, etc. Specify	Discount % or Flat Rate

List any discounts that you are willing to offer for strategic partner, contract term commitment, software options purchased etc. You must specify what the discount is for and whether it is a % discount or flat rate.

**EXHIBIT E
SECURITY FEATURES QUESTIONNAIRE- HOSTED SOLUTION**

Note to Proposer: Attach Additional Pages As Needed

Documentation

1. Do you have a completed Shared Assessments full SIG questionnaire?	
2. Have you undergone a SAS 70 or SSAE 16 audit?	
3. Do you have a documented change management process?	
4. Do you have a formal Incident Response plan?	

Application/Service/Data Security

5. Describe the permissions granted to each role in your application/system?	
6. Describe the level to which the roles and permissions can be customized by OSU.	
7. What specific encryption algorithms are employed for your product(s), system(s) and/or service(s)?	
8. Is all sensitive data (e.g., vaccination records, financial disclosures, non-compliance information) encrypted in transit and at rest? If not, please explain.	
9. Will OSU data be encrypted at rest? (Whole Disk Encryption, DB encryption, column level encryption inside a DB)	
10. Describe the mechanism for transferring data from OSU to your organization. Are these transfers logged?	
11. Is login information such as user name and password encrypted during transmission from the client to the server? NOTE: Base-64 encoding is not acceptable.	
12. Are passwords hashed, so they cannot be decrypted? (SHA-1, SHA-256, MD5, etc.) Please describe.	
13. Does your product, system(s) and/or service(s) prevent the use of shared credentials or accounts including administrative accounts?	
14. Describe how your product, system and/or service authenticates and authorizes users?	
15. Does your product and/or system facilitate compliance with Federal and State laws, such as the 45CFR46, 21CFR11, FERPA, ITAR, and EAR?	
16. Is all access, including administrative accounts, controlled and logged (i.e. firewalls, file system permissions, ACLs, database table permissions, packet logs, etc.)? If not, please explain.	
17. Will OSU data be used in test or development environments?	
18. Does your company own the physical data center where OSU's data will reside?	
19. Do any of your servers reside in a co-located data center?	
20. If you are using a co-located data center, does this data center operate outside of the United States?	
21. If this co-located data center operates outside of the United States, will any of OSU's data ever leave the	

United States?	
22. If OSU data will leave the United States, please list all countries where it will be stored.	
23. Is there a contract in place to prevent data from leaving the United States?	
24. If you are using a co-located data center, please describe how networks and systems are separated.	
25. Are intrusion detection technologies and firewalls utilized on the hosted system(s)?	
26. Describe how your facility is physically secured?	
27. Describe how OSU's data will be kept separate from other customer data.	
Third Parties	
28. Will OSU data be shared with or hosted by any third parties?	
29. If so, list all third parties that will host or have access to OSU data.	
30. Do you perform security assessments of third party companies?	
31. If you do assess third parties, please describe assessment methodology.	
32. How often do you reassess third party companies?	
33. Briefly explain why each of these third parties will have access to OSU data.	
34. Have you experienced a breach?	
Password/Passphrase Management	
35. Can you enforce password / passphrase aging requirements?	
36. Can you enforce password / passphrase complexity requirements?	
37. Are user account passwords / passphrase visible in administration modules?	
38. Are stored user account passwords / passphrases hashed?	
39. What algorithm is used to hash passwords?	
40. Describe the integration protocol for authentication (such as SAML, LDAP, Active Directory, or JASIG CAS), and how authentication is performed in the system.	
41. Confirm that the system does not replicate any user password credentials (hashed or otherwise) except when express permission is granted via signed contract. Describe how this requirement is met.	
42. If the system uses account synchronization, describe synchronization functionality of user account information or user profile metadata, or confirm that this does not apply.	

Vulnerability Assessment/Mitigation	
43. The OWASP 10 identifies the most critical web application security flaws. How does your organization address and mitigate the common application risk identified by the OWASP Top 10. Information about the OWASP Top Ten can be found at https://www.owasp.org/index.php/OWASP_Top_Ten_Project .	
44. Are your applications scanned for vulnerabilities by a qualified third party?	
45. Are your systems scanned for vulnerabilities by a qualified third party?	
46. Are your applications scanned for vulnerabilities prior to new releases?	
47. What application and operating system vulnerability scanning companies do you use?	
48. How often are operating systems and applications scanned?	
49. Are updates to your product released on a regular schedule?	
50. How are critical security patches applied to your systems and applications?	
51. Will we be notified of major changes to your environment that could impact our security posture?	
Disaster Recovery/Backups	
52. Do you have a disaster recovery plan?	
53. Are components of your disaster recovery plan located outside of the United States?	
54. When was the last time you tested your disaster recovery plan?	
55. Are you performing backups?	
56. What type of media is used for backups?	
57. How long are these backups kept?	
58. How is backup media destroyed?	
59. Are you encrypting your backups?	
60. Will you be willing to encrypt backups of OSU data?	
61. Are these backups taken offsite?	
62. Where are all the locations that will store OSU backup data? Please list by country if located outside of the United States.	
Employee Policies/Security Awareness	
63. Do you perform background screenings on employees?	
64. Do you have an information security awareness program?	
65. Is the security awareness training mandatory for all employees?	
66. How frequently are employees required to undergo the security awareness training?	
67. Do your employees hold Information Technology Security certifications and/or secure coding? If so, which ones?	

**EXHIBIT F
REQUIRED SUBMITTAL CHECKLIST**

Proposers need to ensure that the following information on the checklist has been included in their proposal. If pertinent information or required submittals are not included within the Proposal, it may cause the Proposal to be rejected or have an adverse impact on evaluation.

_____ Description of how the goods or services ***specifically*** satisfy the statement of work in section 3.

_____ Detailed information about how the Proposer ***meets the minimum qualifications*** in section 4.

_____ Provide 3 references for universities that have 4000 or more beds in which you have successfully implemented your system. (Proposers can use Exhibit C for this purpose)

_____ Provide a project plan showing how you can meet the four to six week implementation.

_____ Provide your customer support model that shows customer support will be available during standard business hours in the Pacific Time Zone.

_____ Provide detail to show your company and product are or will be ADA Compliant; include detail around testing for adherence to current accessibility guidelines and standards.

_____ Detailed information about how the Proposer ***meets the preferred qualifications*** in section 4.

_____ Provide pricing for both hosted and on-site options if available.

_____ Provide details about the type of strategic relationship you would be able to offer OSU including detail around any price concessions/discounts you are willing to offer in exchange for using OSU as a reference site for potential new customers and in marketing efforts.

_____ Describe the types of client manuals, help systems and how-to documents that are available to the customer and how they can be modified. Detail if your company has any client-to-client support or list-serve options.

_____ Exhibit B: Certifications fully completed.

_____ Exhibit C: References fully completed.

_____ Exhibit D: Complete and itemized pricing of the goods or services requested.

_____ Exhibit E: Security Features Questionnaire (**Only required if proposing a hosted solution**). Attach additional pages as needed.