



**REQUEST FOR PROPOSAL (Phase 1)
P-2020-003259-BK Travel and Expense Management SaaS Solution**

April 3, 2020

Oregon State University ("OSU") is seeking Responsive and Responsible Proposers to submit a response to this phase 1 request for a multi-year contract with OSU for a Travel and Expense Management SaaS Solution.

This is phase 1 of a multi-phase Request for Proposal ("RFP") process. In phase 1 OSU seeks to pre-qualify Proposers that will then be eligible to move into additional phases. Only those Proposers pre-qualified in this phase 1 process may participate in additional phases.

In order to qualify, Proposers must meet the minimum requirements below. Proposers who do not meet the minimum requirements will be notified and have the ability to appeal in accordance with OSU Standard 03-015, Sec. 5.20.

Minimum Requirements

- a. Proposer must have provided a travel and expense SaaS solution for a minimum of three (3) years to at least ten (10) organizations, OTHER THAN higher education institutions, each having a minimum of five thousand (5000) employees.
- b. Proposer must have provided a travel and expense SaaS solution for a minimum of three (3) years to at least five (5) higher education institutions each having a minimum of 10,000 enrolled students.

Proposers need only to submit the attached Documentation of Experience form in response to this phase 1 of the RFP. Additional information is not requested at this time and Proposers are discouraged from responding with anything beyond the Documentation of Experience form. It is the Proposer's sole responsibility to complete the form as fulfillment of the requirements herein.

Proposals must be received electronically as a PDF attachment via **e-mail to bids@oregonstate.edu no later than April 14, 2020, 5:00 pm, PT**. Submissions received after this date and time will not be considered. E-mail subject line should include the RFP title.

Any changes to this RFP will be done by Addendum and no other conversation, email or notification serves to change the requirements in this RFP.

Please note that the sole contact for this RFP is:

Brian Kinsey
OSU Procurement Manager
brian.kinsey@oregonstate.edu
541-737-1027

Please address any questions or requests for clarifications to the sole contact up until April 13, 2020, 3:00 pm, PT. Thank you for your interest in providing Travel and Expense Management SaaS Solution to OSU.

Regards,

Brian Kinsey
Procurement Manager

DOCUMENTATION OF EXPERIENCE FORM

REQUEST FOR PROPOSAL (Phase 1) - Travel and Expense Management SaaS Solution

Proposer's Name: _____

Contact Name: _____

Address: _____

Contact Phone: _____

City, State, Zip: _____

Contact Email: _____

All of the questions on this form are specific to clients who are or were under contract to use Proposer's Travel and Expense Management SaaS Solution.

Total number of organizations OTHER THAN higher education institutions:	
Total number of organizations each having a minimum of five thousand (5000) employees:	
Total number of organizations each having a minimum of five thousand (5000) employees and that Proposer had/has been contracted with for at least three (3) years:	

List the names of ten (10) organizations, OTHER THAN higher education institutions, each having a minimum of five thousand (5000) employees and that Proposer had/has been contracted with for at least three (3) years

1.	2.
3.	4.
5.	6.
7.	8.
9.	10.

Total number of higher education institutions:	
Total number of higher education institutions of similar size and scope as Oregon State University:	
Total number of higher education institutions of similar size and scope as Oregon State University that Proposer had/has been contracted with for at least three (3) years:	

List the names of five (5) higher education institutions of similar size and scope as Oregon State University that Proposer had/has been contracted with for at least three (3) years.

1.	2.
3.	4.
5.	