Request for Proposal
Doc1603963354

Procurement Services

Solicitation For:
Learning Management System

Response Due Date: February 4, 2019

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SECTION ONE
GENERAL INFORMATION AND REQUESTED PRODUCTS/SERVICES

1.1 BACKGROUND AND INTRODUCTION

While Purdue University celebrates its sesquicentennial anniversary, we are actively working towards the next 150 years of providing higher education at the highest proven value. Purdue is proud to be the land-grant University for the State of Indiana offering STEM leadership, world changing research, and transformative education while also being accessible and affordable to all. Together, these initiatives make up the four pillars of Purdue Moves, leverages Purdue's historic strengths, and promotes investment in new ideas to guide the university in its mission.

Purdue University has established itself as one of the world’s premier public university systems. The Purdue University System offers more than 200 majors within Purdue’s 13 colleges and schools at our main campus in West Lafayette, Purdue University Northwest, Purdue University Fort Wayne, and university satellite locations throughout the State of Indiana. Additionally, Purdue Global offers world-class education tailored for working adults with more than 180 online programs.

With the arrival of Purdue’s biggest entering class ever in 2018, Purdue University's overall enrollment has reached its highest all-time level. Total enrollment of 43,411 at Purdue's West Lafayette campus set a new record, with a growth of 1,838 students over last year, and includes 32,672 undergraduates. In addition to our West Lafayette campus, Purdue University Northwest, Purdue University Fort Wayne, and satellite campuses throughout the State of Indiana had a total enrollment of 21,684 in 2018. For more information about Purdue University’s enrollment, please visit our data digest site - https://www.purdue.edu/datadigest/. With Purdue’s partnership with Purdue Global and our recent announcement of Purdue Online, we expect our credit and non-credit enrollments to increase.

Currently, Purdue’s West Lafayette and Northwest campuses are under contract with Blackboard Learn; Purdue Fort Wayne has a separate contract with Blackboard Learn, and Purdue Global uses Brightspace Desire to Learn.

Purdue University is seeking proposals for a Learning Management System for the Purdue University System. It is the intent of Purdue University to solicit responses to this Request for Proposals (RFP) in accordance with the statement of work, proposal preparation section, and specifications contained in this document. This RFP is being issued electronically through our Ariba Sourcing module. Neither this RFP nor any response (proposal) submitted hereto are to be construed as a legal offer.

1.2 DEFINITIONS AND ABBREVIATIONS

Following are explanations of terms and abbreviations appearing throughout this RFP. Other special terms may be used in the RFP, but they are more localized and defined where they appear, rather than in the following list.

- **Purdue University or Purdue**
  - Purdue University of West Lafayette, including regional campuses at Purdue University Northwest (PNW), Purdue University Fort Wayne (PFW), all university satellite locations, and Purdue Global.

- **Purdue University Department**
  - Purdue University Department means a College, Unit, or other entities engaged in the academic, research, or service mission of the university.

- **CUF**
  - Commercially Useful Function – A business function that supports the scope of this solicitation

- **Full Time Equivalent (FTE)**
  - Purdue University defines FTE as a measurement of an employee's productivity when executing the scope of work in this RFP for a specific project or contract. An FTE of 1 would mean that there is one worker fully engaged on a project. If there are two employees each spending 1/2 of their working time on a project that would also equal 1 FTE

- **Implementation**
  - The successful implementation of the LMS at the Purdue University locations as specified in the contract resulting from this RFP
Installation  The delivery and physical setup of products or services requested in this RFP

Products  Tangible goods or manufactured items as specified in this RFP

Proposal  An offer

Respondent  An offeror. Purdue University will not consider a proposal responsive if two or more offerors submit a joint or combined proposal. One entity or individual must be clearly identified as the respondent who will be ultimately responsible for performance of the contract.

Services  Work to be performed as specified in this RFP

Total Bid Amount  The amount that the respondent proposes on Attachment C that represents their total, all-inclusive price.

Supplier  Any successful respondent selected as a result of the procurement process to deliver the products or services requested by this RFP

1.3 PURPOSE OF THE RFP

The purpose of this RFP is to provide interested parties with information to enable them to prepare and submit proposals for a comprehensive enterprise Learning Management System, including assistance with implementation and integration with other existing systems and software. Purdue intends to use the results of this RFP to award a contract for these products and services.

1.4 SUMMARY SCOPE OF WORK AND REQUIREMENTS

Requirements:

Respondent must have 3 years proven experience in the provision of similar products and services to institutions of Higher Education.

Respondent must be able to provide a separate account for each Purdue University institution.

Summary of Scope of Work:

In addition to the other criteria listed within this RFP, Purdue University will evaluate each Respondent’s ability to provide and demonstrate a solution to our Functionality/Academic Case Studies and Technical Case Studies. These case studies will cover LMS transition, multiple section courses, usability, accreditation, group work, grading, course calendar, day-to-day academic support, non-credit courses, content accessibility, getting data in, getting data out, day-to-day technical support, system updates, and third-party integrations.

1.5 RFP OUTLINE

The outline of this RFP document is described below:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 1 – General Information and Requested Products or Services</td>
<td>This section provides an overview of the RFP, general timelines for the process, and a summary of the products/services being solicited by Purdue University via this RFP</td>
</tr>
</tbody>
</table>
1.6 QUESTION/INQUIRY PROCESS

All questions/inquiries regarding this RFP must be submitted through Ariba by the deadline of 5:00 p.m. ET on January 16, 2019. Questions/Inquiries must be submitted using on the Q&A Template and sent via the Ariba Sourcing Event message board. Respondents questions must be received by the time and date indicated above.

Following the question/inquiry due date, Procurement personnel will compile a list of the questions/inquiries submitted by all Respondents. The responses will be posted via an Ariba Sourcing Event message according to the RFP timetable established in Section 1.2. Only answers posted via Ariba Sourcing Event message will be considered official and valid by Purdue University. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any Purdue University employee.

Inquiries are not to be directed to any staff member of Purdue University. Such action may disqualify Respondent from further consideration for a contract resulting from this RFP.

If it becomes necessary to revise any part of this RFP, or if additional information is necessary for a clearer interpretation of provisions of this RFP prior to the due date for proposals, an addendum will be posted through the Ariba Sourcing Event. If such addenda issuance is necessary, Procurement may extend the due date and time of proposals to accommodate such additional information requirements, if required.

1.7 DUE DATE FOR PROPOSALS

All proposals must be received via Ariba no later than 5:00 p.m. ET on February 4, 2019. Each copy of the proposal must follow the format indicated in Section Two of this document. Unnecessarily elaborate brochures or other presentations, beyond those necessary to present a complete and effective proposal, are not desired.

Late proposal submissions will not be accepted.

No more than one proposal per Respondent may be submitted.

Purdue University accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.

1.8 PRE-PROPOSAL CONFERENCE (NOT APPLICABLE)

At this conference, potential respondents may ask questions about the RFP and the RFP process. Respondents are
reminded that no answers issued verbally at the conference are binding and any information provided at the conference, unless it is later issued in writing, also is not binding to Purdue University.

1.9 MODIFICATION OR WITHDRAWAL OF OFFERS

The Respondent's authorized representative may withdraw or modify their proposal, prior to the due date. Modification to, or withdrawal of, a proposal received by the Purdue University after the exact hour and date specified for receipt of proposals will not be considered.

1.10 PRICING

Pricing on this RFP must be firm and remain open for a period of not less than 180 days from the proposal due date. Any attempt to manipulate the format of the document, attach caveats to pricing, or submit pricing that deviates from the current format will put your proposal at risk.

Please refer to the Cost Proposal sub-section under Section 2 for a detailed discussion of the proposal pricing format and requirements.

1.11 PROPOSAL CLARIFICATIONS AND DISCUSSIONS, AND CONTRACT DISCUSSIONS

Purdue University reserves the right to request clarifications on proposals submitted to Purdue University. Purdue University also reserves the right to conduct proposal discussions, either oral or written, with Respondents. These discussions could include request for additional information, request for cost or technical proposal revision, etc. Additionally, in conducting discussions, Purdue University may use information derived from proposals submitted by competing respondents only if the identity of the respondent providing the information is not disclosed to others. Purdue University will provide equivalent information to all respondents which have been chosen for discussions. Discussions, along with negotiations with responsible respondents may be conducted for any appropriate purpose.

Purdue University will schedule all discussions. Any information gathered through oral discussions must be confirmed in writing.

A sample contract is provided in Attachment B. Any requested changes to the sample contract must be submitted with your response (See Section 2.3.5 for details). Purdue University reserves the right to reject any of these requested changes. It is Purdue University’s expectation that any material elements of the contract will be substantially finalized prior to contract award.

1.12 BEST AND FINAL OFFER

Purdue University may request best and final offers from those Respondents determined by Purdue University to be reasonably viable for contract award. However, Purdue University reserves the right to award a contract on the basis of initial proposals received. Therefore, each proposal should contain the Respondent’s best terms from a price and technical standpoint.

Following evaluation of the best and final offers, Purdue University may select for final contract negotiations/execution the offers that are most advantageous to Purdue University, considering cost and the evaluation criteria in this RFP.

1.13 REFERENCE SITE VISITS

Purdue University may request a site visit to a Respondent’s working support center to aid in the evaluation of the Respondent’s proposal. Site visits, if required will be discussed in the technical proposal.

1.14 TYPE AND TERM OF CONTRACT

Purdue University intends to sign a contract with one or more Respondent(s) to fulfill the requirements in this RFP.
The term of the contract shall be for a period of five (5) years from the date of contract execution. There may be three (3) one-year renewals for a total of eight (8) years at the Purdue University’s option.

Purdue University reserves the right to issue a split award.

1.15 CONFIDENTIAL INFORMATION

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 et seq., and, after the contract award, the entire RFP file may be viewed and copied by any member of the public, including news agencies and competitors. Respondents claiming a statutory exception to the APRA must indicate so in the Transmittal Letter. The Respondent must also specify which statutory exception of APRA that applies. Purdue University reserves the right to make determinations of confidentiality. If the Respondent does not identify the statutory exception, Purdue University will not consider the submission confidential. If Purdue University does not agree that the information designated is confidential under one of the disclosure exceptions to APRA, it may seek the opinion of the Purdue University’s Office of Legal Counsel. Prices are not confidential information.

1.16 TAXES

Proposals should not include any tax from which Purdue University is exempt.

1.17 SECRETARY OF STATE REGISTRATION

If awarded the contract, the Respondent will be required to register, and be in good standing, with the Secretary of State. The registration requirement is applicable to all limited liability partnerships, limited partnerships, corporations, S-corporations, nonprofit corporations and limited liability companies. Information concerning registration with the Secretary of State may be obtained by contacting:

Secretary of State of Indiana
Corporation Division
402 West Washington Street, E018
Indianapolis, IN 46204
(317) 232-6576
www.in.gov/sos

1.18 COMPLIANCE CERTIFICATION

Responses to this RFP serve as a representation that it has no current or outstanding criminal, civil, or enforcement actions initiated by Purdue University, and it agrees that it will immediately notify Purdue University of any such actions. The Respondent also certifies that neither it nor its principals are presently in arrears in payment of its taxes, permit fees or other statutory, regulatory or judicially required payments to Purdue University. The Respondent agrees that Purdue University may confirm, at any time, that no such liabilities exist, and, if such liabilities are discovered, that Purdue University may bar the Respondent from contracting with Purdue University, cancel existing contracts, withhold payments to offset such obligations, and withhold further payments or purchases until the entity is current in its payments on its liability to Purdue University and has submitted proof of such payment to Purdue University.

1.19 EQUAL OPPORTUNITY COMMITMENT

There is a reasonable expectation of minority, woman and veteran business opportunities on a contract awarded under this RFP.

1.20 MINORITY, WOMEN, & VETERAN BUSINESS ENTERPRISES RFP COMMITMENT

Purdue University strives to contribute to the establishment, preservation, and strengthening of minority, women, and veteran owned businesses. The University encourages the participation of these providers in our procurement activities. Further, the University encourages Firms bidding for major contracts to provide for the participation of these businesses through partnerships, joint ventures, and other contractual opportunities. The University reserves the right to require periodic reports on the usage of these firms in the performance of major contracts.
Respondents shall take all necessary and reasonable steps to ensure that these businesses have the maximum opportunity to compete for and perform work included in the RFP documents. For assistance in identifying MBE/WBE/VBE subcontracting enterprises for your project, contact Purdue University’s Office of Supplier Diversity Development at (765) 494-3739.

MBE/WBE/VBE Participation Plan: The MBE/WBE/VBE Participation Plan for products/services under this RFP is included in Attachment A. Purdue University must be able to confirm certification of classification.

- Each Firm can serve as only one classification: MBE, WBE, or VBE.
- Firm must provide goods or services specific to the contract.
- Must serve a Commercially Useful Function (CUF). The firm must serve a value-added purpose on the engagement as confirmed by Purdue University

1.21 AMERICANS WITH DISABILITIES ACT


1.22 SUMMARY OF MILESTONES

The following timeline is only an illustration of the RFP process. The dates associated with each step are not to be considered binding. Due to the unpredictable nature of the evaluation period, these dates are commonly subject to change. At the conclusion of the evaluation process, all Respondents will be informed of the evaluation team’s findings.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
</tr>
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<tbody>
<tr>
<td>Issue of RFP</td>
<td>January 3, 2019</td>
</tr>
<tr>
<td>Deadline to Submit Written Questions</td>
<td>January 16, 2019</td>
</tr>
<tr>
<td>Response to Written Questions/RFP Amendments</td>
<td>January 25, 2019</td>
</tr>
<tr>
<td>Submission of Proposals</td>
<td>February 4, 2019</td>
</tr>
</tbody>
</table>

The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Evaluation</td>
<td>TBD</td>
</tr>
<tr>
<td>Proposal Discussions/Clarifications</td>
<td>TBD</td>
</tr>
<tr>
<td>Oral Presentations</td>
<td>March 2019</td>
</tr>
<tr>
<td>Best and Final Offers (if applicable)</td>
<td>TBD</td>
</tr>
<tr>
<td>RFP Award Recommendation</td>
<td>May 2019</td>
</tr>
</tbody>
</table>

1.23 EVIDENCE OF FINANCIAL RESPONSIBILITY (25 IAC 1.1-1-5) (NOT APPLICABLE)

If the contract is greater than 1 Million Dollars ($1,000,000.00), financial surety or protection may be required. When appropriate and subject to the discretion of the purchasing agency, the purchasing agency will require the successful bidder to submit evidence of financial responsibility prior to submission of a fully executed contract. The evidence of financial shall not exceed 10% of the contract price. If the contract is less than 1 Million Dollars ($1,000,000.00), this section may be deleted.

Evidence of financial responsibility, in the amount of [INSERT AMOUNT (% or $), NOT TO EXCEED 10% OF THE CONTRACT PRICE], when required to guarantee the performance of the selected respondent prior to a fully executed contract. The evidence of financial responsibility must, when required, must remain in effect for the duration of the contract including any/all renewals. The evidence of financial responsibility must be in the form of an irrevocable letter of credit, certified check, cashier’s check, or a bond acquired from a surety company registered with the Indiana Department of Insurance or other evidence deemed acceptable by Purdue University. Notwithstanding any other provisions relating to the beginning of the term, the contract shall not become effective until the evidence of financial responsibility required by the contract is delivered in the correct form and amount to Purdue University. The evidence of financial responsibility must be submitted to the following address prior to contract execution:

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1.24 CONFLICT OF INTEREST

Any person, firm or entity that assisted with and/or participated in the preparation of this RFP document is prohibited from submitting a proposal to this specific RFP. For the purposes of this RFP “person” means an employee, or any individual or entity working with or advising Purdue University or involved in the preparation of this RFP proposal. This prohibition would also apply to an entity who hires, within a one-year period prior to the publication of this RFP, a person that assisted with and/or participated in the preparation of this RFP.

Respondent is required to complete the Conflict of Interest Affidavit, Attachment G.

PURDUE EMPLOYEE: See Purdue University’s Conflicts of Commitment and Reportable Outside Activities for Purdue employees (III.B.1). Reference the following website: http://www.Purdue University.edu/policies/ethics/iiib1.html
SECTION TWO  
PROPOSAL PREPARATION INSTRUCTIONS

2.1 GENERAL  
To facilitate the timely evaluation of proposals, a standard format for proposal submission has been developed and is described in this section. All Respondents are required to format their proposals in a manner consistent with the guidelines described below:

- Each item must be addressed in the Respondent's proposal.
- The Transmittal Letter must be in the form of a letter. The business and technical proposals must be organized under the specific section titles as listed below.
- The electronic copies of the proposal submitted through Ariba Sourcing should be organized to mirror the sections below and the attachments.
- Whenever possible, please submit all attachments in their original format.

2.2 TRANSMITTAL LETTER  
The Transmittal Letter must address the following topics.

2.2.1 Agreement with Requirement listed in Section 1  
The Respondent must explicitly acknowledge understanding of the general information presented in Section 1 and agreement with any requirements/conditions listed in Section 1.

2.2.2 Summary of Ability and Desire to Supply the Required Products or Services  
The Transmittal Letter must briefly summarize the Respondent’s ability to supply the requested products and/or services that meet the requirements defined in Section 2.4 of this RFP. The letter must also contain a statement indicating the Respondent’s willingness to provide the requested products and/or services subject to the terms and conditions set forth in the RFP including, but not limited to Purdue University’s mandatory contract clauses.

2.2.3 Signature of Authorized Representative  
A person authorized to commit the Respondent to its representations and who can certify that the information offered in the proposal meets all general conditions including the information requested in Section 2.3.4, must sign the Transmittal Letter. In the Transmittal Letter, please indicate the principal contact for the proposal along with an address, telephone and fax number as well as an e-mail address, if that contact is different than the individual authorized for signature.

2.2.4 Respondent Notification  
Unless otherwise indicated in the Transmittal Letter, Respondents will be notified via e-mail.

It is the Respondent's obligation to notify the Purdue University of any changes in any address that may have occurred since the origination of this solicitation. Purdue University will not be held responsible for incorrect vendor/contractor addresses.

2.2.5 Confidential Information  
Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 et seq. (see section 1.15).

Provide the following information:
- List all documents where claiming a statutory exemption to the APRA;
- Specify which statutory exception of APRA that applies for each document;
- Provide a description explaining the manner in which the statutory exception to the APRA applies for each document.

2.2.6 Other Information  
Please provide a high-level overview of your product and a high-level description of how it would address the needs of the Purdue University System.
Describe in detail any ways in which your proposed solution differs from the assumption that each proposed solution includes a common, industry-wide, base, LMS toolset (e.g., course news area, calendar, content repository, quiz tool, discussion tool, and gradebook.).

2.3 BUSINESS PROPOSAL
The Business Proposal must address the following topics except those specifically identified as “optional.” The Business Proposal Template is Attachment D.

2.3.1 General (optional)
This section of the business proposal may be used to introduce or summarize any information the Respondent deems relevant or important to Purdue University’s successful acquisition of the products and/or services requested in this RFP.

2.3.2 Respondent’s Company Structure
The legal form of the Respondent’s business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization are to be included in this section. If the organization includes more than one product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization.

2.3.3 Company Financial Information
This section must include the Respondent's financial statement, including an income statement and balance sheet, for each of the two most recently completed fiscal years. The financial statements must demonstrate the Respondent's financial stability. If the financial statements being provided by the Respondent are those of a parent or holding company, additional financial information should be provided for the entity/organization directly responding to this RFP.

2.3.4 Integrity of Company Structure and Financial Reporting
This section must include a statement indicating that the CEO and/or CFO has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The particular areas of interest to Purdue University in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. Purdue University will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

The Sarbanes Oxley Act of 2002, H.R. 3763, is NOT directly applicable to this procurement; however, its goals and objectives may be used as a guide in the determination of corporate responsibility for financial reports.

2.3.5 Contract Terms/Clauses
A sample contract that Purdue University expects to execute with the successful Respondent(s) is provided in Attachment B. This contract contains both mandatory and non-mandatory clauses. Mandatory clauses are listed below and are non-negotiable. Other clauses are highly desirable. It is Purdue University’s expectation that the final contract will be substantially similar to the sample contract provided in Attachment B.

In your Transmittal Letter please indicate acceptance of these mandatory contract terms. In this section, please review the rest of the contract and indicate your acceptance of the non-mandatory contract clauses. If a non-mandatory clause is not acceptable as worded, suggest specific alternative wording to address issues raised by the specific clause. If you require additional contract terms please include them in this section. To reiterate it is Purdue University's strong desire to not deviate from the contract provided in the attachment and as such Purdue University reserves the right to reject any and all of these requested changes.

The mandatory contract terms are as follows:
Any or all portions of this RFP and any or all portions of the Respondents response may be incorporated as part of the final contract.

2.3.6 References
The Respondent must include a list of at least three (3) clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. Information provided should include the name, address, and telephone number of the client facility and the name, title, and phone of a person who may be contacted for further information.

2.3.7 Registration to do Business
Selected out-of-state Respondents providing the products and/or services required by this RFP must be registered to do business within the State by the Indiana Secretary of State. The address contact information for this office may be found in Section 1.17 of the RFP.

2.3.8 Authorizing Document
Respondent personnel signing the Transmittal Letter of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement.

2.3.9 Subcontractors
The Respondent is responsible for the performance of any obligations that may result from this RFP, and shall not be relieved by the non-performance of any subcontractor. Any Respondent's proposal must identify all subcontractors and describe the contractual relationship between the Respondent and each subcontractor. Either a copy of the executed subcontract or a letter of agreement over the official signature of the firms involved must accompany each proposal.

Any subcontracts entered into by the Respondent must be in compliance with Purdue University statutes, and will be subject to the provisions thereof. For each portion of the proposed products or services to be provided by a subcontractor, the technical proposal must include the identification of the functions to be provided by the subcontractor and the subcontractor’s related qualifications and experience.

The combined qualifications and experience of the Respondent and any or all subcontractors will be considered in Purdue University’s evaluation. The Respondent must furnish information to Purdue University as to the amount of the subcontract, the qualifications of the subcontractor for guaranteeing performance, and any other data that may be required by Purdue University. All subcontracts held by the Respondent must be made available upon request for inspection and examination by appropriate Purdue University officials, and such relationships must meet with the approval of Purdue University.

The Respondent must list any subcontractor's name, address and the state in which formed that are proposed to be used in providing the required products or services. The subcontractor's responsibilities under the proposal, anticipated dollar amount for subcontract, the subcontractor's form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Respondent of any responsibilities in responding to this RFP or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority, Women, or
Veteran Owned Business. See Section 1.20 and Attachment A for Minority, Women, and Veteran Business Participation.

2.3.10 Evidence of Financial Responsibility [NOT APPLICABLE]
This section will indicate the ability to provide the mandatory evidence of financial responsibility. See Section 1.25 for details.

Notwithstanding any other provisions relating to the beginning of the term, any contract will not become effective until the evidence of financial responsibility is delivered in the correct form and amount to the address indicated in Section 1.25.

2.3.11 General Information
Each Respondent must enter your company's general information including contact information.

2.3.12 Experience Serving Higher Education Institutions
Each Respondent is asked to please provide a brief description of your company's experience in serving higher educational institutions.

2.3.13 Experience Serving Similar Clients
Each Respondent is asked to please describe your company's experience in serving clients of a similar size to Purdue University that also had a similar scope. Please provide specific clients and detailed examples. Please remember Purdue University's regional campuses and Purdue Global are each individually accredited institutions.

2.3.14 Payment
Purdue University's available payment terms are as follows:
- ACH Options:
  - 3% 10, Net 45
  - 2% 20, Net 45
  - 1% 30, Net 45
  - Net 45, no discount
- Pay immediately, payment method “Virtual Credit Card”

For more information about the “Virtual Credit Card” accelerated payment program, visit [https://www.purdue.edu/business/account/acctpay/sua.html](https://www.purdue.edu/business/account/acctpay/sua.html)

2.3.15 Value Added Offerings
Purdue is always considering creative, cost-effective solutions to increase efficiencies and decrease spend. Does your company offer integrated service programs that will add value to the contract? Please describe the details of the program including cost, structure, and the benefits to be realized by Purdue as an alternative to the proposal for consideration.

2.4 TECHNICAL PROPOSAL
The Technical Proposal must be divided into the sections as described below. Every point made in each section must be addressed in the order given. The same outline numbers must be used in the response. RFP language should not be repeated within the response. Where appropriate, supporting documentation may be referenced by a page and paragraph number. However, when this is done, the body of the technical proposal must contain a meaningful summary of the referenced material. The referenced document must be included as an appendix to the technical proposal with referenced sections clearly marked. If there are multiple references or multiple documents, these must be listed and organized for ease of use by Purdue. The Technical Proposal Template is Attachment E.

The Functional section and Technical section of the Technical Proposal will have multiple case studies. Respondents will be required to submit short videos demonstrating various aspects of their proposed solution to that case study. Please include a link/URL to the video, if possible, in the Technical Proposal. Purdue’s intent is to locate these materials on a secure server for approximately eight (8) weeks, accessible by secure login to Purdue evaluators, subject matter experts,
and procurement personnel directly involved in evaluating the proposal. Please include closed captioning option in the videos. Any licenses, waivers, nondisclosure agreements, or other releases that Respondents may require in order for Purdue to use these materials as described must be included with the proposal at no cost to Purdue.

The scenario method of evaluation allows Purdue to focus its evaluation most efficiently on those aspects of proposed solutions that matter most to us. Purdue assumes that each proposed solution includes a common, industry-wide, base, LMS toolset (e.g., course news area, calendar, content repository, assignment-submission tool, quiz tool, discussion tool, and gradebook). If your solution differs from this assumption, provide details in the corresponding section in the Technical Proposal. Each scenario will be scored based on innovation, creativity, simplicity, effectiveness, and completeness in addressing the challenges in the scenario, as well as ease of use.

For each case study in the Technical Proposal, a Respondent must submit a narrative describing how its proposed solution would address the given scenario, and a video illustrating the solution described in the narrative.

Describe in detail any ways in which your proposed solution differs from the assumption that each proposed solution includes a common, industry-wide, base, LMS toolset (e.g., course news area, calendar, content repository, assignment-submission tool, quiz tool, discussion tool, and gradebook).

### Functional Section

2.4.1 Functional Case Study #1 – LMS Transition  
2.4.2 Functional Case Study #2 – Multiple Sections  
2.4.3 Functional Case Study #3 - Usability  
2.4.4 Functional Case Study #4 – Accreditation  
2.4.5 Functional Case Study #5 – Group Work  
2.4.6 Functional Case Study #6 - Grading  
2.4.7 Functional Case Study #7- Course Calendar  
2.4.8 Functional Case Study #8 – Day-to-Day Academic Support  
2.4.9 Functional Case Study #9 – Non-Credit Courses  
2.4.10 Functional Case Study #10 – Content Accessibility

### Technical Section

2.4.11 Technical Case Study #1 – Getting Data In  
2.4.12 Technical Case Study #2 – Getting Data Out  
2.4.13 Technical Case Study #3 – Day-to-Day Support  
2.4.14 Technical Case Study #4 – System Updates  
2.4.15 Technical Case Study #5 – Third-Party Integrations

### COST PROPOSAL

**The Cost Proposal Template is Attachment C.**

The Cost Proposal must be submitted in the original format. Any attempt to manipulate the format of the Cost Proposal document, attach caveats to pricing, or submit pricing that deviates from the current format will put your proposal at risk.

**Cost Proposal Narrative**

The Respondent should provide a brief narrative (not longer than two pages) in support of each Cost Proposal item. The narrative should be focused on clarifying how the proposed prices correspond directly to the Respondent’s Technical Proposal. For example, evaluators will expect detailed explanation of Maintenance and Support to correspond to Maintenance and Support items if described in the Technical Proposal.

**Cost Assumptions, Conditions and Constraints**

The respondent should list and describe as part of its Cost Proposal any special cost assumptions, conditions, and/or constraints relative to, or which impact, the prices presented on the Cost Schedules. It is of particular importance to describe any assumptions made by the respondent in the development of the respondent’s Technical Proposal that have a material impact on price. It is in the best interest of the respondent to make explicit the assumptions, conditions, and/or constraints that underlie the values presented on the Cost Schedules. Assumptions, conditions or constraints that conflict with the RFP requirements are not acceptable.
2.6 BUY INDIANA

Purdue University’s goal is to provide opportunity and increase spend with Indiana businesses. Definitions and details noted below as defined by the State of Indiana. See Indiana business in Business Proposal Template Attachment D.

**Defining an Indiana Business:**

“Indiana business” refers to any of the following:

1. A business whose principal place of business is located in Indiana.
2. A business that pays a majority of its payroll (in dollar volume) to residents of Indiana.
3. A business that employs Indiana residents as a majority of its employees.
4. A business that makes significant capital investments in Indiana.
5. A business that has a substantial positive economic impact on Indiana.

**Substantial Capital Investment:**

Any company that can demonstrate a minimum capital investment of $5 million or more in plant and/or equipment or annual lease payments of $2.5 million or more shall qualify as an Indiana business under category #4. If an out of state company does not meet one of these criteria, it can submit documentation/justification to the State for review for inclusion under this category.

**Substantial Indiana Economic Impact:**

Any company that is in the top 500 companies (adjusted) for one of the following categories: number of employees (DWD), unemployment taxes (DWD), payroll withholding taxes (DOR), or Corporate Income Taxes (DOR); it shall qualify as an Indiana business under category #5. If a Respondent needs assistance in determining if its business qualifies under this criterion, please send an email inquiry to buyindianainvest@idoa.in.gov and you will receive a response within forty-eight (48) hours. If an out of state company does not meet one of these criteria, it can submit documentation/justification to the State for review for inclusion under this category.

It is the Respondent’s responsibility to confirm its Buy Indiana status for this portion of the process. If a Respondent has previously registered its business with IDOA, go to http://www.in.gov/idoa/2464.htm and click on the link to update this registration. Click the tab titled Buy Indiana. Select the appropriate category for your business. Respondents may only select one category. Certify this selection by clicking the check box next to the certification paragraph. Once this is complete, save your selection and exit your account.

Respondents that have not previously registered with IDOA should go to http://www.in.gov/idoa/2464.htm and click on the link to register. During the registration process, follow the steps outlined in the paragraph above to certify your business’ status. The registration process should be complete at the time of proposal submission. The Respondent’s Buy Indiana status should be finalized when the RFP response is submitted to Purdue.

2.7 VENDOR SECURITY QUESTIONNAIRE

All Respondents must complete and submit with your response Purdue University’s Vendor Security Questionnaire – Attachment H.
## 3.1 PROPOSAL EVALUATION PROCEDURE

Purdue University has selected a group of personnel to act as a proposal evaluation team. Subgroups of this team, consisting of one or more team members, will be responsible for evaluating proposals with regard to compliance with RFP requirements. All evaluation personnel will use the evaluation criteria stated in Section 3.2. The Senior Director of Auxiliary Services, Purdue University, or their designee will, in the exercise of their sole discretion, determine which proposals offer the best means of servicing the interests of Purdue University. The exercise of this discretion will be final.

The procedure for evaluating the proposals against the evaluation criteria will be as follows:

1. Each proposal will be evaluated for adherence to requirements on a pass/fail basis. Proposals that are incomplete or otherwise do not conform to proposal submission requirements may be eliminated from consideration.

2. Each proposal will be evaluated on the basis of the categories included in Section 3.2. A point score has been established for each category.

3. Based on the results of this evaluation, the qualifying proposal determined to be the most advantageous to Purdue University, taking into account all of the evaluation factors, may be selected for further action, such as contract negotiations. If, however, it is decided that no proposal is sufficiently advantageous to Purdue University, Purdue University may take whatever further action is deemed necessary to fulfill its needs. If, for any reason, a proposal is selected and it is not possible to consummate a contract with the Respondent, Purdue University may begin contract preparation with the next qualified Respondent or determine that no such alternate proposal exists.

## 3.2 EVALUATION CRITERIA

Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the RFP in a cost-effective manner. Each of the evaluation criteria categories is described below with a brief explanation of the basis for evaluation in that category. The points associated with each category are indicated following the category name. For further information, please reference Section 3.2.3 below. If any one or more of the listed criteria on which the responses to this RFP will be evaluated are found to be inconsistent or incompatible with applicable federal laws, regulations or policies, the specific criterion or criteria will be disregarded and the responses will be evaluated and scored without taking into account such criterion or criteria.

### Summary of Evaluation Criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Adherence to Mandatory Requirements</td>
<td>Pass/Fail</td>
</tr>
<tr>
<td>2. Management Assessment/Quality (Business and Technical Proposal)</td>
<td>70 (available points)</td>
</tr>
<tr>
<td>3. Cost (Cost Proposal)</td>
<td>30 (available points)</td>
</tr>
<tr>
<td>4. Buy Indiana</td>
<td>1</td>
</tr>
<tr>
<td>5. Minority Business Enterprise (MBE) Commitment</td>
<td>2</td>
</tr>
<tr>
<td>6. Women Business Enterprise (WBE) Commitment</td>
<td>2</td>
</tr>
<tr>
<td>7. Veteran Business Enterprise (VBE) Commitment</td>
<td>2</td>
</tr>
</tbody>
</table>

100
All proposals will be evaluated using the following approach:

**Step 1**

In this step proposals will be evaluated only against Criteria 1 to ensure that they adhere to Mandatory Requirements. Any proposals not meeting the Mandatory Requirements will be disqualified.

**Step 2**

The proposals that meet the Mandatory Requirements will then be scored based on Criteria 2 and 3 ONLY. This scoring will have a maximum possible score of 100 points. All proposals will be ranked on the basis of their combined scores for Criteria 2 and 3 ONLY. This ranking will be used to create a “short list”. Any proposal not making the “short list” will not be considered for any further evaluation.

Step 2 may include one or more rounds of proposal discussions, oral presentations, clarifications, demonstrations, etc. focused on cost and other proposal elements. Step 2 may include a second “short list”.

**Step 3**

The short-listed proposals will then be evaluated based on all the entire evaluation criteria outlined in the table above.

If Purdue University conducts additional rounds of discussions and a BAFO round which lead to changes in either the technical or cost proposal for the short listed Respondents, their scores will be recomputed.

The section below describes the different evaluation criteria.

3.2.1 Adherence to Requirements – Pass/Fail
Respondents passing this category move to Phase 2 and proposal is evaluated for Management Assessment/Quality and Price.

The following 2 categories cannot exceed 100 points.

3.2.2 Management Assessment/Quality (Business/Technical) – (70 points)
3.2.3 Cost – (30 points)
Total Cost scores will be normalized to one another, based on the lowest cost proposal evaluated. The lowest cost proposal receives a total of (30) points. The normalization formula is as follows:

- **Respondent’s Cost Score = (Lowest Cost Proposal / Total Cost of Proposal) X 30**

3.2.4 Minority, Women & Veteran Business Enterprises
The following formula will be used to determine points to be awarded based on responses including MINORITY, WOMEN, & VETERAN BUSINESS ENTERPRISES. Scoring is conducted based on the following. Bonus points will be given in support of: Minority (2 points), Women’s Business (2 points) Indiana Veteran Business Enterprise (2 points). The MBE, WBE, or VBE subcontracting commitments will be normalized to one another, based on the highest commitment evaluated. The highest commitment will receive a total of 2 points. The normalization formula is as follows:

- **Respondent’s score = (Highest %/respondents %) 2**

Each subcontracting category will be normalized.

3.2.5 Buy Indiana
Respondents qualifying as an Indiana Company as defined in Section 2.6 will receive (1 point) in this category.