A REQUEST FOR PROPOSAL (RFP)
University of Wisconsin System

Digital Learning Environment

Request for Proposal (RFP) RG-17-2663

Issued: January 25, 2017

Proposals must be submitted
No later than 2:00 p.m. CST
February 28, 2017

For further information regarding this RFP, contact:
Ruth Ginzberg
Office of Procurement
UW System Administration
780 Regent Street
Madison, WI 53715
Email: rginzberg@uwsa.edu
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1.1 Introduction and background

The University of Wisconsin (UW) System is seeking a Digital Learning Environment to succeed its current Learning Management System. A Digital Learning Environment in this context is considered to be the digital “hub” for a confederation of services and tools that support teaching and learning, versus simply an administrative tool for managing course content.

Since its creation, the University of Wisconsin System has established itself as one of the world’s premier public university systems. Each year the University of Wisconsin educates approximately 180,000 students on 26 campuses, and serves more than one million citizens through statewide extension programs.

UW System’s campuses in Madison and Milwaukee offer both undergraduate and graduate degree programs, including doctoral and professional programs. Eleven comprehensive campuses provide students both undergraduate and master’s degree programs in smaller, more individualized academic settings. The 13 UW Colleges deliver freshman-sophomore courses for students seeking a foundation for a bachelor’s degree.

UW-Extension works with all 26 UW campuses, all 72 Wisconsin counties, and a wide variety of other educational partners to bring UW expertise to all corners of the state. It also is the home of UW’s Flexible Option degree programs, which award credit based on demonstrated competency, not class time.

All UW System campuses and UW-Extension programs provide Wisconsin’s citizens with opportunities to contribute to the state’s growing “knowledge economy” through the University of Wisconsin’s three-pronged mission of teaching, research and public service.

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

1.2 Scope of the project

The results of this RFP will be used by a central administrative unit and all campuses of the University of Wisconsin System except UW-Madison.

1.3 Procuring and contracting agency

This Request for Proposal (RFP) is issued by the University of Wisconsin System Office of Procurement which is the sole point of contact for UW during the selection process. The person responsible for managing the procurement process is Ruth Ginzberg (rginzberg@uwsa.edu).

The contract resulting from this RFP will be administered by the University of Wisconsin System's Office of Learning and Information Technology Services (OLITS). The contract administrator will be Renee Pfeifer-Luckett or her designee or successor.
1.4 Definitions

The following definitions are used throughout the RFP.

Contractor means proposer awarded the contract.
Proposer/vendor means an entity submitting a proposal in response to this RFP
State means State of Wisconsin.
University means the University of Wisconsin
UWS means University of Wisconsin System.
UW means the University of Wisconsin.
1.5 Clarification and/or revisions to the specifications and requirements

Any questions concerning this RFP must be submitted in writing via electronic mail message (e-mail) on or before Feb 6, 2017 to:

Ruth Ginzberg  
Senior I.T. Procurement Specialist  
Office of Procurement  
University of Wisconsin System  
rginzberg@uwsa.edu

Vendors are expected to raise any questions, exceptions, or additions they have concerning the RFP DOCUMENT at this point in the RFP process. If a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the vendor should notify immediately the above named individual of such error and request modification or clarification of the RFP.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, revisions/amendments and/or supplements will be provided to all recipients of this initial RFP.

Each proposal shall stipulate that it is predicated upon the requirements, terms, and conditions of this RFP and any supplements or revisions thereof.

Any contact with State employees or University of Wisconsin employees or students concerning this RFP is strictly prohibited, except as authorized in writing, in advance, by the above named individual during the period from release of the RFP until the notice of intent to contract is released. Unauthorized communication with members of the University of Wisconsin community regarding this RFP may result in disqualification of the vendor.

1.6 Vendor conference

Depending on the number of questions received before the deadline of Feb 6, 2017 and at the sole discretion of the University, an optional vendor videoconference may be held to respond to written questions and to provide any needed additional instruction to vendors on the submission of proposals. The University does not anticipate a vendor videoconference at this time but reserves the right to schedule one if necessary. If the University schedules a vendor videoconference, all vendors will be notified, and all vendors who intend to respond to the RFP should attend the vendor videoconference.

1.7 Reasonable accommodations

The University will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request. If you think you need accommodations at a proposal opening or vendor conference, contact Ruth Ginzberg at 608-890-3961 (voice) or via email at rginzberg@uwsa.edu.
1.8 Calendar of events

Listed below are specific and estimated dates and times of actions related to this Request for Proposal (RFP). The actions with specific dates must be completed as indicated unless otherwise changed by the University. In the event that the University finds it necessary to change any of the specific dates and times in the calendar of events listed below, it will do so by issuing a supplement to this RFP. There may or may not be a formal notification issued for changes in the estimated dates and times.

<table>
<thead>
<tr>
<th>DATE</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 25, 2017</td>
<td>Date of issue of the RFP.</td>
</tr>
<tr>
<td>Feb 6, 2017</td>
<td>Last day for submitting written inquires.</td>
</tr>
<tr>
<td>Feb 10, 2017 (est.)</td>
<td>Supplements or revisions to the RFP released</td>
</tr>
<tr>
<td>Feb 28, 2017 (firm)</td>
<td>Proposals due from vendors at 2:00 pm CST</td>
</tr>
<tr>
<td>Early April</td>
<td>Semi-finalists must make “sandbox” available to evaluators</td>
</tr>
<tr>
<td>Mid-Late April, 2017</td>
<td>Possible Vendor Finalist Interviews in Madison, WI</td>
</tr>
<tr>
<td>May, 2017 (est.)</td>
<td>Notification of intent to award sent to vendors.</td>
</tr>
<tr>
<td>Fall, 2017 (est.)</td>
<td>Contract start date</td>
</tr>
</tbody>
</table>

1.9 Contract term and funding

The contract shall be effective on the contract execution date and shall run for three (3) years from that date, with an option by mutual agreement of the agency and contractor, to renew for two (2) additional two-year periods.

2.0 PREPARING AND SUBMITTING A PROPOSAL

2.1 General instructions

The evaluation and selection of a contractor and the contract will be based on the information submitted in the vendor's proposal plus references, any required hands-on assessments (“sandbox”) and any required on-site visits or oral interviews. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

Elaborate proposals (e.g., expensive artwork), beyond that sufficient to present a complete and effective proposal, are not necessary or desired.

2.2 Incurring costs

The University of Wisconsin is not liable for any cost incurred by proposers in replying to this RFP.

2.3 Submitting the proposal

Proposers must submit one (1) electronic copy on a CD or DVD, plus an original and thirteen (13) hard copies of all materials required for acceptance of their proposal by February 28, 2017 2:00 PM CST to:
Proposals must be received in the above office by the specified time stated above. *All proposals must be time-stamped as accepted by the Office of Procurement by the stated time. Proposals not so stamped will not be accepted.* Receipt of a proposal by the University mail system does not constitute receipt of a proposal by the Office of Procurement, for purposes of this RFP.

To ensure confidentiality of the document, all proposals must be packaged, sealed and show the following information on the outside of the package:

—Proposer's name and address
—Request for proposal title
—Request for proposal number
—Proposal due date

An electronic copy on a CD or DVD plus an original and three (3) hard copies of the Cost Proposal must be sealed and submitted as a separate part of the proposal. The outside of the envelope must be clearly labeled with the words “Cost Proposal, RFP (Name of RFP)” and name of the vendor and due date. The cost proposal is due to the addressee on the due date and time noted above.

2.4 Special notes regarding this RFP

1. Proposers will be required to submit a DVD containing short videos demonstrating various aspects of their proposed solution. The University’s intent is to locate these materials on a secure server for approximately four (4) weeks, accessible by secure login to UW evaluators, subject matter experts, and procurement personnel directly involved in evaluating the proposal. Any licenses, waivers, nondisclosure agreements, or other releases that proposers may require in order for the University to use these materials as described must be included with the proposal at no cost to the University. Proposers may not substitute materials located at their own URLs or otherwise accessible via the Internet for this requirement. Proposers unable to create or submit videos may substitute other written or illustrated documents, but should be aware that these alternate materials will be scored less favorably than the requested videos.

2. Finalists will be required to make a “sandbox” environment available to a sizeable number of designated hands-on usability testers from all campuses of the University of Wisconsin for approximately three to four (3-4) weeks. This may include faculty, staff, administrators, course designers, data analysts, individuals with disabilities, librarians, technology professionals, and students. Their structured feedback will comprise the Usability score for this RFP. Access to the “sandbox” as well as any licenses, waivers, nondisclosure agreements, or other releases that proposers may require in order for these members of the Evaluation
team to access the “sandbox” as described must be provided within seven (7) days of notification of proposer’s finalist standing, at no cost to the University. Failure to meet this requirement will result in elimination of the proposal from further consideration.

2.5 Proposal organization and format

Proposals should be printed and submitted on 8.5 by 11 inch paper bound securely. The required DVD should be securely attached to the Original. Proposals should be organized and presented in the order and by the number assigned in the RFP. **Proposals should not contain URLs or web addresses containing information that is part of the proposal. Evaluators will not visit URLs contained in proposals and will not consider or evaluate information located at such URLs.** Proposals must be organized with the following headings and subheadings. Each heading and subheading should be separated by tabs or otherwise clearly marked.

- **Section 4.1 Mandatory Requirements:** All items, numbered as 4.1.1 through 4.1.3, must be responded to with either "Meets this requirement" or "Does not meet this requirement". Proposals will be reviewed to determine whether mandatory requirements have been met as described in section 3.1 prior to proceeding to the next step of the evaluation process.

- **Section 4.2 Company Overview**

- **Section 4.3 Proposer References:** Please submit on Form DOA-3478 and attach supplemental information if necessary.

- **Section 5.1 Functional Requirements** (5.1.1 through 5.1.10 answered in narrative form with accompanying video – read instructions before responding)

- **Section 5.2 Technical Requirements** (5.2.1 through 5.2.14 answered in narrative form – please restate the question and provide the answer in the order listed)

- **Section 5.3 Training and Development Requirements** (5.3.1 through 5.3.7 answered in narrative form - please restate the question and provide the answer in the order listed)

- **Section 5.4 Usability Requirements** (See Special Note 2.4 (2) above)

- **Section 6.0 Cost Proposal:** The vendor must submit its Cost Proposal separately, and on the form provided in Appendix B according to the instructions provided. **No mention of the cost proposal may be made in the response to the Functional, Technical or Service requirements of this Request for Proposal.**

- **Section 9.0, Required Forms as follows:**
  - Designation of Confidential and Proprietary Information (DOA-3027)
  - Vendor Information (DOA-3477)
  - Vendor Reference (DOA-3478)
  - Affidavit
  - Wisconsin Cooperative Purchasing Form (DOA-3333)

Failure to provide any requested information in the prescribed format may result in disqualification of the proposal.

2.6 Multiple proposals
Multiple proposals from a vendor will be permissible; however, each proposal must conform fully on its own to the requirements for proposal submission. Each such proposal must be submitted separately and labeled as Proposal #1, Proposal #2, etc. on each page included in the response. Alternate acquisition plans (varying Cost Proposals) do not constitute multiple proposals.

2.7 Oral presentations and site visits

Top scoring vendors based on an evaluation of the written proposal may be required to participate in interviews and/or site visits to support and clarify their proposals, if requested by the University. The University will make every reasonable attempt to schedule each presentation at a time and location that is agreeable to the proposer. Failure of a proposer to interview or permit a site visit on the date scheduled may result in rejection of the vendor's proposal.

2.8 Demonstrations

Top-scoring vendor(s) may be required to install and demonstrate the proposed product(s) and/or service(s) at a UW site, or to provide guest access to a fully functional demonstration site so UW evaluators can review and test the proposed product(s). This may include usability and accessibility testing of any kind, as deemed necessary by the University.

Product(s) being demonstrated must be available and ready for UW evaluators' use upon two (2) weeks' notice. The University will furnish detailed specifications concerning the details of this requirement on request. Failure of a vendor to furnish the product(s) and/or service(s) it has proposed for demonstration within the time constraints of the preceding paragraph may result in rejection of that proposal. Failure of any product(s) and/or service(s) to meet the University's specified requirements during the demonstration may result in rejection of the vendor's proposal.

The successful demonstration of the vendor's product(s) and/or service(s) does not constitute acceptance by the University. Any product(s) and/or service(s) furnished by the vendor for the purposes of this demonstration must be identical in every respect to those which will be furnished if a contract results.

2.9 Withdrawal of proposals

Proposals shall be irrevocable until contract award unless the proposal is withdrawn. Proposers may withdraw a proposal in writing at any time up to the proposal closing date and time if such request is received by the RFP project manager. To accomplish this, the written request must be signed by an authorized representative of the proposer and submitted to the RFP project manager. If a previously submitted proposal is withdrawn before the proposal due date and time, the proposer may submit another proposal at any time up to the proposal closing date and time.

3 PROPOSAL SELECTION AND AWARD PROCESS

3.1 Preliminary evaluation
Accepted proposals will be reviewed initially to determine if mandatory requirements are met. **Failure to meet mandatory requirements will result in rejection of the proposal.** In the event that all vendors fail to meet one or more of the mandatory requirements, the University reserves the right to continue the evaluation of the proposals and to select the proposal which most closely meets the requirements specified in this RFP.

3.2 Proposal scoring

Various costing methodologies and models are available to analyze the cost information to determine the lowest cost to UWS. UWS personnel will select one method for scoring costs and will use it consistently throughout its analysis of all the cost proposals. UWS will determine at its sole discretion the cost proposal scoring methodology. This may, at the sole discretion of the University, include Total Cost of Ownership scoring.

Accepted proposals will be reviewed by an evaluation committee and scored against the stated criteria. **No proposer or proposer’s employee or agent may contact any member of an evaluation committee except at the UWS’s direction.** The committee may review references, request interviews, and/or conduct on-site visits and use the results in scoring the proposals.

3.3 Supplier Diversity

Proposals from **certified** Minority Business Enterprises and Disabled Veteran owned businesses may have points weighted by a factor of 1.00 to 1.05 to provide up to a five percent (5%) preference to these businesses (Wis. Stats. 16.75(3m)). The evaluation committee's scoring will be tabulated and proposals ranked based on the numerical scores received.

3.4 Evaluation criteria

The proposals will be scored using the following criteria:

<table>
<thead>
<tr>
<th>Description</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Functional Requirements</td>
<td>30%</td>
</tr>
<tr>
<td>2. Technical Requirements</td>
<td>30%</td>
</tr>
<tr>
<td>3. Training &amp; Development</td>
<td>10%</td>
</tr>
<tr>
<td>4. Usability</td>
<td>10%</td>
</tr>
<tr>
<td>5. Cost</td>
<td>20%</td>
</tr>
</tbody>
</table>

Total: 100%

The evaluation committee must award at least 60% of all available points for the functional, technical, and training elements prior to having the cost proposal scored. A proposal that receives less than 60% of the available points on functional, technical, and training elements will be ineligible for further consideration.
3.5 Right to reject proposals and negotiate contract terms

The University reserves the right to reject any and all proposals. The University may negotiate the terms of the contract, including the award amount, prior to entering into a contract.

3.6 Award and final offers

The University will compile the final scores for each proposal. The award will be granted in one of two ways. The award may be granted to the highest scoring responsive and responsible proposer. Alternatively, the highest scoring proposer or proposers may be requested to submit final and best offers. If final and best offers are requested by the University and submitted by the vendor, they will be evaluated against the stated criteria, scored and ranked by the evaluation committee. The award then will be granted to the highest scoring proposer. However, a proposer should not expect that the University will request a final and best offer.

3.7 Notification of intent to award

All vendors who respond to this RFP will be notified in writing of the University’s intent to award the contract(s) as a result of this RFP.

After notification of the intent to award is made, and under the supervision of agency staff, copies of proposals will be available for public inspection upon reasonable notice from 8:00 a.m. to 4:30 p.m. at 780 Regent Street, Madison Wisconsin. Vendors should schedule reviews with Jessica Jones at jjones@uwsa.edu

3.8 Disputes

Any dispute of the University’s award must be made in writing no later than five (5) working days after University of Wisconsin System Administration Office of Procurement issues the intent to award notice. Written notice of dispute must be filed with the Associate Vice President of Administrative Services of the University Wisconsin System in care of:

Rich Lampe
Director, UW System Office of Procurement
University of Wisconsin System Administration
780 Regent Street, Suite 105
Madison, WI 53715

A complete written dispute must be received by the Director, UW-System Office of Procurement, no later than five (5) working days after the award notice is issued.

The Disputant may appeal the decision of the Associate Vice President of Administrative Services of the University Wisconsin System to the Vice President of Administration of the University of Wisconsin System within five working days of issuance of the decision, with a copy to the UW System Office of Procurement.
4 GENERAL PROPOSAL REQUIREMENTS

4.1 Mandatory requirements

The following requirements in section 4.1 are mandatory and the proposer must satisfy them. See section 3.1 for clarification if necessary.

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

4.1.2 Proposer must be able to provide a separate account for each UWS Institution listed in Appendix A.

4.1.3 The State of Wisconsin requires purchased contractual services to be performed in the United States (Wis Stats 16.705 (1r)). Contractor warrants that services provided to the University under this contract will be performed in the United States. The inability to perform services in the United States shall be grounds for disqualifying your proposal for this contract.

4.2 Company Overview

4.2.1 Please provide a general overview of your company and a detailed description of your experience and capabilities with the provision of these products and services to institutions of higher education. Include when your company began offering these services and an approximate number of customers that have utilized them since their inception.

4.2.2 Please state the number of years in this business, including where applicable, previous firm names.

4.2.3 Please indicate the number and description of any cancelled or terminated contracts within the last five years.

4.3 Proposer references

Proposers must include in their RFPs a list of at least five (5) organizations with whom the proposer has done business like that required by this solicitation within the last two (2) years. For each organization the Proposer must include the current, accurate name, title, address, and telephone number of a contact person along with a brief description of the project or assignment which was the basis for the business relationship. UWS will determine, at its sole discretion, which, if any, references to contact to assess the quality of work performed and personnel assigned to the project. The results of any references will be provided to the evaluation committee and used in scoring the proposal. Please be certain to supply accurate, current contact info for references. Individuals conducting reference checks will not track down references for whom inaccurate or outdated info has been supplied. Any reference that cannot be contacted with a reasonable amount of effort shall count as a negative reference.
Proposer is requested to provide a brief description, with pertinent details, of their ability to provide the following services or products (items should be answered in the order given). Do not substitute already existing marketing materials for a response to the specific question asked.

**Note:** Any costs for services should not be listed in the answers to these questions but rather included in the separate Cost Proposal Form.

5.1. Functional Requirements – 30% of total score

5.1.1. The University of Wisconsin (UW) System is seeking a Digital Learning Environment to succeed its current Learning Management System. A Digital Learning Environment in this context is considered to be the digital “hub” for a confederation of services and tools that support teaching and learning, versus simply an administrative tool for managing course content.

Please provide a high level overview of your product and a high level description of how it would address the needs of the University of Wisconsin System. Comprehensive information about the University of Wisconsin System and its organization, campuses, mission, guiding principles, vision, strengths, challenges, environment, and other relevant information is available at [https://www.wisconsin.edu/](https://www.wisconsin.edu/)

Do not substitute generic marketing materials for a response specifically geared to the University of Wisconsin’s mission, goals, environment and priorities.

5.1.2. 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.).

**SCENARIOS**

**Please read the following information carefully before responding.**

The scenario method of evaluation allows the University to focus its evaluation most efficiently on those aspects of proposed solutions that matter most to us.

The University 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 Section 5.1.2 below.

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.

Proposals will not be penalized for the inclusion of third-party tools in creating scenario solutions. The cost of any third-party tools used in addressing the
following scenarios will not be scored. Rather, the ability to meet the University’s teaching and learning needs elegantly is of utmost importance.

Learning analytics, media management, web conferencing, and ePortfolio tools are considered third-party tools/services for this purpose.

HOW TO ADDRESS THE FOLLOWING SCENARIOS

For each scenario below, proposer must submit a narrative describing how its proposed solution would address the given scenario, and a video or animation of less than 5 minutes duration 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).

5.1.3. SCENARIO #1

Instructor Perspective

Dr. Smith teaches a large, 120 student, Introduction to Biology course every semester. She completely redesigned her course in Fall 2016 using your solution. Dr. Smith is teaching the same course in Spring 2017. She would like to set up and run the Spring 2016 course just as she did during the Fall 2016 semester. However, Dr. Smith also sets up her course so that one piece or set of content (i.e., course file, link, quiz, discussion, etc.) must be accessed and successfully completed by the student before the student can move on to the next set of content. How would Dr. Smith leverage the learning environment to replicate her Fall 2016 course in creating her in Spring 2017 course? What best practices should Dr. Smith use to make modifications to the Spring 2017 course in an effective and efficient manner? If the content organization, gradebook logic, quizzes, and discussions are the same for both courses, what manual changes would the instructor need to make to ensure the course is ready for Spring 2017?

5.1.4. SCENARIO #2

Student and Instructor Perspectives

It is imperative that the learning environment, with or without third party tools integrated, fosters and supports collaboration and communication between and among instructors and students. Dr. Jones teaches a Business Management course that is structured around group work, and includes a capstone group project. The 35-student course is typically self-divided by students into five groups, with seven students in each group.
**Part A:** To facilitate group work on the project, Dr. Jones requires the ability to use your solution to support the following activities electronically:

- Distribution of course materials at the group level (not to an individual student or the entire class).
- Facilitation of two-way communication between and among students, groups and the instructor on a synchronous and asynchronous basis, in written, audio and video formats.
- Creation and Administration of assessments and feedback (including grading) at the group level.

**Part B:** Students require the ability to use your solution to support the following activities electronically:

- Submission of group work
- Facilitation of two-way communication between and among students, groups and the instructor on an synchronous and asynchronous basis, in written, audio and video formats
- Peer (group to group) feedback

How does your solution support group work as outlined in Parts A & B?

5.1.5. SCENARIO #3

**Inclusion of Guests into the Learning Environment**

Using Scenario 2 as a basis, how are guests (those not affiliated with the UW System) able to communicate and interact with students, groups, and instructors using your solution?

5.1.6. SCENARIO #4

**Administrator Perspective**

Jen Atkins is a Learning Management System administrator for one of the UW system institutions. She is charged with maintaining courses, including fulfilling instructor requests for courses that are not automatically created using the institution’s student information system (SIS) to populate course and user data. Ms. Atkins also fulfills many requests for data, including detailed statistics about system and tool usage and user behavior within the environment. She also regularly modifies, combines and deletes user roles and user permissions.

How can your solution be leveraged effectively and efficiently to support Jen in fulfilling her responsibilities to manage and maintain the learning environment, including incorporation of user data that is not brought in through an SIS integration (non-matriculated students, for example), generation of usage
statistics, maintenance of user roles and permissions, as well as management of
the course creation, curation, and archiving process?

5.1.7. SCENARIO #5

Student and Instructor Perspectives

Students live mobile lives and expect their learning environment to support
anytime, anywhere access to their coursework. Instructors increasingly use active
teaching techniques that include activities outside the classroom.

Anthony Yang is an instructor in the Art Department and often assigns activities
that require the student to be in non-classroom settings, such as museums, parks,
and other public spaces. How does your solution, either with or without the
integration of 3rd-party tools, support a student’s mobile access to the solution’s
toolset to

- produce and upload a photo or video assignment?
- complete an onsite quiz assessment?
- create an onsite reflection discussion post using a wireless, mobile device
  (e.g., “smart” phone, tablet, laptop, etc.)?

In your narrative, include a description of how your product’s mobility could be
negatively impacted by environmental factors (i.e., factors outside the control of
your company, your product or the client product administrator(s)).

5.1.8. SCENARIO #6

Student and Instructor Perspectives

Professor Denton requires that her engineering students learn and use
mathematical and scientific expressions. Show how equation creation and editing
by both instructors and students can be made available within your solutions
assessment toolset or through integration with a third-party solution.

5.1.9. SCENARIO #7

Student Perspective

The look and feel of many learning environments are instructor or administrator
controlled. What are your recommended best practices for leveraging your
solution to accommodate main stream, third-party assistive tools that support all
learners? UWS is very interested in learning about the flexibility of your solution
so that it can accommodate individual learning differences. It is particularly
important that the learning environment be enabled to support differing learning
styles, accommodate low vision, deaf, hard of hearing, or other varying student
abilities. What best practices do you recommend so a student with low vision can
modify your solution’s learning environment interface to meet his or her needs?
To address specific student needs, describe how your solution supports instructor
configuration of the time allotted for completion of a course activity at the individual, student level.

5.1.10. SCENARIO #8

**Administrative Needs for Data Generated in the Learning Environment**

Ray is the Financial Aid officer at his campus. Per federal regulations, higher education institutions that support the provision of financial aid for students are required to monitor student academic activity, as defined by the United States Department of Education. To meet federal regulations, Ray needs the ability to identify students enrolled in an online course at his institution who have not had a sufficient level of student activity (e.g., create a discussion posting, complete a quiz, engage with the instructor, etc.) in a course during the current term. Demonstrate how your company’s solution can be leveraged to meet Ray’s need for reliable “student activity” information he needs for federal regulation compliance.

5.2. Technical Requirements – 30% of Total Score

Provide a narrative response to each of the questions in this section.

5.2.1. Accessibility

5.2.1.1. Describe how the solution is attempting to comply with the U.S. Federal Rehabilitation Act, Section 508 (36 CFR Part 1194, http://www.section508.gov). Please provide a Voluntary Product Accessibility Template (VPAT).

5.2.1.2. Describe how the solution is attempting to comply with the Web Content Accessibility Guidelines (WCAG) to support web content accessibility.

5.2.2. Analytics

5.2.2.1. Describe if the solution is certified by the IMS Consortia Analytics standard (currently Caliper).

5.2.2.2. Describe the process for accessing raw data from the source systems.

5.2.2.3. List the standard reports and data elements available to users to build custom reports.

5.2.2.4. Describe the manner in which user reports and associated data can be exported and list supported formats.

5.2.3. Availability
5.2.3.1. List historical uptime and information for any incidents, downtime or service degradation for the previous two years, including length of impact. Provide a description of expected availability and redundancy precautions.

5.2.3.2. Describe how upgrades, outages and other notices are communicated. What input does the customer have in the scheduling of upgrades? Include: notification triggers, how long for notification to occur, who is notified, means of notification, resolution time, updates on progress.

5.2.3.3. Describe how support is provided when there is a technical/functional problem with the solution. Include: support hours, who can call, who responds, response time, resolution time, software or access requirements to resolve and any costing.

5.2.3.4. Describe the process for maintaining the learning environment (backups, updates, security patches, etc.) and emphasize any impact on users.

5.2.3.5. Describe the disaster recovery capabilities, including testing process and frequency, recovery time from failover events, and geographic distribution of infrastructure.

5.2.4. Data Management

5.2.4.1. The solution should be able to provide the UW with a copy of its learning environment data within 30 days of the request. The data must be in a reusable form to be determined at the time of the request. Explain how your solution addresses this need.

5.2.4.2. Describe how the solution links “person” records across extent tools within the learning environment.” Specifically, how does a single user’s data from multiple sources come together in a single record to feed a third-party data analysis tool.

5.2.4.3. Does your solution provide real-time access to data within your solution? If so, please describe your recommended method for accessing and exporting your solution’s data.

5.2.4.4. Describe how data, backups and archives can be restricted to only users authorized by the UW.

5.2.4.5. Describe how the solution provides a granular, configurable (by the vendor upon request) backup/recovery solution.

5.2.4.6. Describe how the solution supports open records requests. This functionality is in the form of data discoverability and reporting, including extracts of selected data. It is preferred that the UW have access to this functionality versus requesting data from the vendor.

5.2.4.7. Describe your content migration strategies and support.

5.2.4.8. What languages does your solution support? Describe available customization for language localization.

5.2.5. Identity and Access Management
5.2.5.1. Describe how the solution consumes identity data via SAML assertion during the user login process.

5.2.5.2. Describe if a local user account is required, and if so how the solution will provide an API that allows for the programmatic provisioning (creation) and deprovisioning of user accounts and/or has a connector available for commercial Identity Management Frameworks (e.g. Oracle Identity Manager)?

5.2.5.3. Describe if a local user account is required, and if so how the solution will provide a web services interface that can receive Service Provisioning Markup Language (SPML) messages and/or can use a Security Assertion Markup Language (SAML) assertion to synchronize attributes.

5.2.5.4. Describe how the solution can, in real-time, access and Extensible Access Control Markup (XACML)-based external security decision service or the solution can accept SAML assertions for use in making the access decision.

5.2.5.5. Describe how the solution supports SAML V2.

5.2.5.6. Describe how the solution supports interoperability with multiple external Identity Providers and Discovery Services and dynamically publishes and consumes federation metadata (including cryptographic keys) in order to obtain information about federation endpoints.

5.2.5.7. Describe whether the solution natively uses eduPerson schema attributes for consumption of identity data.

5.2.5.8. Describe whether the solution natively uses eduPersonPrincipalName or eduPersonTargetedID as a unique identifier.

5.2.5.9. Describe how the solution handles changes to a unique identifier that appear in a SAML assertion or other data feed without loss of functionality or data for that user.

5.2.5.10. Describe how the solution provides a means for UW System to designate users as private, and provides a means of restricting display of these users’ information to only those people that have a legitimate business need to see their information.

5.2.5.11. Describe how the solution supports deep linking, meaning that the user, if already logged in, can navigate directly to pages for which they are authorized without having to log in again.

5.2.5.12. Describe how the solution provides granular security where each important function and object can be explicitly restricted to authorized users.

5.2.5.13. Describe if the solution has the ability to group important functions and objects into roles for assignment to users.

5.2.5.14. Describe if the solution includes pre-defined roles that meet the business requirements (e.g. Administrator, Supervisor, etc.)
5.2.5.15. Describe how the solution is able to deny user permissions to a function, group of functions, objects and groups of objects at any point in the authorization tree.

5.2.6. Security

5.2.6.1. Describe the solution’s logical security design and configuration, including servers and other infrastructure.

5.2.6.2. If the solution is compliant with one or more of Cloud Security Alliance, FEDRAMP, FISMA or industry recognized security standards, please provide supporting documentation that so-demonstrates.

5.2.6.3. Explain how the solution is Health Insurance Portability and Accountability Act (HIPAA) compliant when HIPAA data is stored within the learning environment?

5.2.6.4. Describe in detail the ways in which the solution supports UW’s compliance with the Family Educational Rights and Privacy Act (FERPA).

5.2.6.5. Does the solution store passwords? If so, can this be turned off via configuration?

5.2.6.6. Describe if the solution persists “High Risk” data, as defined by the UW System Administrative Procedure 1031.A [https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/information-security-data-classification/information-security-data-classification]; all such data must be encrypted while in storage.

5.2.6.7. Describe the solution’s encryption methods and/or its ability to interface with encryption software during communication between client stations. If the solution sends or receives “High Risk” data, as defined by the UW System Administrative Procedure 1031.A [https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/information-security-data-classification/information-security-data-classification]; all such data must be encrypted while in transmission.

5.2.6.8. How frequently is vulnerability (internal and external) testing of all components of the solution performed and by whom is it performed?

5.2.6.9. How does the solution capture relevant security information for incident investigations (academic misconduct, violation of campus appropriate use policies, etc.)?

5.2.6.10. Describe what logs the solution maintains on usage (sessions, etc.) and on unauthorized attempts to access the system, system functionality, and/or specific data.

5.2.6.11. Discuss configurability of security log retention in your product.

5.2.6.12. Describe how the solution restricts and monitors access to it and its associated functionality.

5.2.6.13. Are security logs exportable for external evaluation and investigation?

5.2.6.15. How often are independent 3rd party security audits conducted? Will the audit results be shared with the UW? Please provide the date of the last audit, who performed the audit, and a summary of the audit results.

5.2.6.16. Describe how frequently user activities are audited and collected (date and time of event, user involved, action attempted, and result). How is audit data exported for analysis?

5.2.6.17. Describe how quickly the respondent notifies customers about the discovery of security vulnerability and remediation plans?

5.2.6.18. Describe how the solution supports operating system, server, Learning Environment, and third party component patches within 30 days of patch release?

5.2.6.19. Describe the firewall methodology used by the solution. Provide a list of the firewall products that are used and how they fit into the overall architecture.

5.2.6.20. Describe how the solution ensures that secure or private information does not remain on the user workstation after sessions are closed (e.g., caching of data, etc.).

5.2.6.21. Describe how the solution ensures that user sessions that are “left logged in” are not used inappropriately.

5.2.6.22. Describe the auto-log-off capability of the solution after a configurable predetermined period of inactivity.

5.2.7. Support

5.2.7.1. Describe the model used to engage and support the UW with a successful implementation and effective management of the solution. Provide details noting the structure, roles, and communication channels (include diagrams, if available).

5.2.7.2. Describe the types of support available for initial set-up and ongoing operations for administrative staff, including specifics about response time to reported issues.

5.2.7.3. Describe the support channels available to users (e.g., web-based, phone, email, etc.), availability, and workflow.

5.2.7.4. Describe how service updates and/or informational releases are distributed to various UWS audiences (administrative, technical, and users).

5.2.8. System Components and Architecture

5.2.8.1. Describe if there are any hardware, software or technology components required to be installed at a UW institution.

5.2.8.2. Describe your plans for keeping up-to-date with dependent technologies, including methods for notifying customer of updated technology requirements, and modes of distributing updates.
5.2.8.3. Describe if the solution supports multiple client OS platforms (e.g., Windows, Mac).

5.2.8.4. Describe the timeframe within which the vendor supports new versions of operating systems (e.g., within 30 days of Release to Manufacturing).

5.2.8.5. Describe any stand-alone desktop software required to utilize all features of the solution.

5.2.8.6. Describe the overall architecture of the solution, including diagrams when possible.

5.2.8.7. Describe any functionality on the product Roadmap referenced as part of this proposal.

5.2.8.8. Describe any new functionality on the product Roadmap that is not addressed elsewhere in this proposal and estimated release timeframes.

5.2.8.9. Describe the process through which requests from the UW for new functionality or changes to existing functionality will be addressed.

5.2.8.10. Describe the preferred or reference hosting platform (OS, database, middleware).

5.2.8.11. Describe how contributions from the Open Source community are incorporated into releases.

5.2.8.12. Describe any user community that develops and shares code that extends the capability of the solution.

5.2.9. System Integration

5.2.9.1. Does the solution provide a web services API? (RESTful web services are preferred)

5.2.9.2. Describe how the solution integrates with Student Information Systems (SIS). The UW uses multiple PeopleSoft SIS’s and a Salesforce Student Engagement System (SEG). At a minimum, integration with the solution will include the automated daily bulk extract, transform, transmission and import of student, instructor, course, enrollment, and role data from the SIS/SEG. The UW prefers the IMS LIS 2.0 standard for integration with Student Information Systems. If selected as a finalist, be prepared to demonstrate how this integration is accomplished.

5.2.9.3. Describe the process for automatic transmission of final course grade data from the solution directly to the SIS.

5.2.9.4. Describe how the solution uses the current LTI standards to integrate with other systems. If selected as a finalist, be prepared to demonstrate how this integration is accomplished. Some examples (not a complete list) of systems that must integrate with the learning environment are:
- Remote proctoring solutions (Examity, etc.)
- Content Authoring (SoftChalk)
- Test Generators (Respondus)
- Media management solution (Kaltura)
- Plagiarism detection solution (Turnitin)
- Audience Response Systems (iClickers, Turning Technologies)

5.2.9.5. Describe the technologies used to extend the functionality of the solution (including scripting, APIs, SDKs, or other similar technologies). Provide examples documenting these extensions.

5.2.9.6. Describe how the provider ensures integrations within the Learning Environment remain compatible with new releases.

5.2.9.7. Provide examples of solution components that currently use the API framework.

5.2.9.8. Describe how the solution uses LTI Common Cartridge to import/recognize other LMS course packages.

5.2.9.9. Describe the process for combining one or more courses/sections within the LMS. Courses and sections as defined in the Student Information System may not correspond to their definition in the Learning Environment and may need to be combined or separated. The UW refers to this as course matching and defines it as a means to input mapping information, a repository to store the mapping information, and the ability to perform the mapping. Describe this process and how it affects groupings (groups) within the courses/sections, grades sent back to SIS, and other functions commonly performed within a single course.

5.2.10. System Performance and Scalability

5.2.10.1. Describe how system performance is monitored and the tools available natively within the product. Also describe the performance target benchmarks used for determining satisfactory performance delivery.

5.2.10.2. Describe the ability of the solution to scale during heavy system loads to maintain performance levels. How many concurrent users does the solution support before performance degradation is noticed?

5.2.10.3. Describe the solution’s architecture in terms of scalability. The Respondent must clearly indicate how scale of use (concurrent usersstreams, bandwidth) may impact performance and how problems would be corrected. How might the performance or problem mitigation differ depending on the hosting option employed? Describe any limitations to scalability that may exist.

5.2.10.4. Describe the definition of acceptable performance for the solution, how it is measured, and how the solution infrastructure (software and hardware) can be scaled to maintain acceptable performance. Include specifics on how the server environment (web, file, database, other) can be scaled and how load may be distributed to maintain acceptable performance.

5.2.10.5. Describe the recommended instance structure (single or multiple) and how it addresses security and vulnerability concerns (ex. All campuses effected vs. single campus effected).
5.2.11. **Technical Documentation**

5.2.11.1. Describe available technical documentation including information included with new releases. Also please indicate if documentation can be customized beyond branding.

5.2.11.2. Provide a list of the printed and electronic formats (i.e. PDF, HTML, Word, online in the Learning Environment, etc.) in which each set of documentation is available.

5.2.11.3. Describe any limitations on the distribution of documentation.

5.2.11.4. Describe how the organization ensures that the documentation provides clear, accurate, and detailed error messages. Please provide an example of product release notes or other documentation.

5.2.12. **Training**

5.2.12.1. Describe training available for University system administrators, including any additional cost involved.

5.2.12.2. Describe any other training support materials available (online and otherwise), including additional fees.

5.2.13. **User Interface**

5.2.13.1. Describe how consistency of the user interface and functions are maintained across all supported desktop platforms? Describe any discrepancies and indicate solutions or temporary work-arounds, as applicable.

5.2.13.2. Describe whether end user and administrative functionality is accessible via web interfaces.

5.2.13.3. Describe, based on each user role (e.g., student, teaching assistant, instructor, etc.) the intuitive, customizable nature of user Interfaces, including easy navigation design and access to common functions. Include whether user interfaces are designed to support mobile technologies.

5.2.13.4. Describe the functionality differences between the web client, desktop client and mobile client.

5.2.13.5. Describe any required or optional browser plug-ins and add-ons/extensions, and why they are needed.

5.2.13.6. Describe type of cookies that are required, what is collected, and how they are used?

5.2.13.7. Describe how the solution supports the most common Internet browsers and mobile devices (e.g. Android, Windows Phone, iOS). Identify browsers supported. Specify if the product renders via a native app and/or HTML via a browser.

5.2.13.8. Describe available customization for UW System Administration and Institution-level branding/theming.
5.2.14. User Management

5.2.14.1. Describe the roles, ability to assign permissions, options for customization, and any limitations.

5.2.14.2. Describe in detail how user accounts are provisioned.

5.2.14.3. Describe in detail the process to set up integration and the user interfaces for management of enrollment, entitlements, and permissions.

5.2.14.4. Describe the process for creating and deleting users (with the option to retain or delete associated content) manually or through a batch process independent of integrations.

5.2.14.5. Describe the available options for enabling and enforcing quotas, including associated monitoring and notification processes.

5.3. Training and Development – 10% of Total Score

The University of Wisconsin has support staff on each campus who support development of best practices in the use of teaching and learning technologies. These can include site administrators, instructional support staff, student support staff (libraries, disability services), instructors, students, and university administration. Your solution should assist these personnel in this endeavor.

We value the following:

Personalizable materials - materials that are easily able to be customized, mashedup, or altered to fit the needs of UW System and/or potentially by individual campuses, instructional or technology support units, academic programs/departments, or instructors.

Easily accessible materials - open, not requiring authentication of a vendor to access, creative commons licensing for clients, searchable, available from mobile devices, available to multiple stakeholders, including students, available 24-7, 503b compliant; be ADA compliant and meet accessibility needs.

Timely updates to communications and training and development materials to make UWS aware of product changes and their impacts on the learning environment.

5.3.1. Describe any pedagogical and instructional technical “how-to” guides you provide for faculty, instructors, and support staff.

Of particular interest are guides that explain how to increase efficiencies and to reduce workload, such as inline grading and content revisions, importing of graded assignments, rubrics, exam items and grades; provide perspective of and improve the student experience and personalization, including student-views and student activity,
progress, and alerts; support organization and design of course, including recommended layouts for consistency; transfer content and course materials from one LMS installation to another; explain how to enhance psychometric ability of assessments, randomize my quiz questions, item difficulty, responses; and, ensuring quality of courses, including through course- and student-level reporting.

5.3.2. Describe any technical “how-to” guides you provide for mobile devices and work compatibility, accessibility and universal design, collaboration and sharing, organization and design, analytics and assessment, seamless integration of third-party materials and tools, and sharing of content across courses and publically;

5.3.3. Describe the technical “how-to” guides you provide from the faculty and student perspective for all tools (e.g., Create Discussions and Grade Discussions for faculty and Participate in Discussions for students).

5.3.4. Describe any pedagogical training and technical support for new instructional data-driven models you supply, including competency-based learning, self-paced instruction, self-directed learning, learning analytics, adaptive learning, and personalized instruction. Include any materials or instruction addressing pedagogical and technical support for different modes of delivery, including flipped, blended, and online.

5.3.5. Describe any technical guides and support for developers that you provide, including API development and LTI integrations.

5.3.6. Describe any Training and technical guides for technology management for site administrators, including system architecture, scalability, security, and development.

5.3.7. Describe any guides and support you provide in organizational administration, including policy issues (academic, operational), data retention, user support, training, and quality assurance, etc.

5.4. Usability – 10% of Total Score

Please note that there are no separate questions regarding usability.

Usability scores will be generated based on feedback from usability testers. Proposers may if they wish, but are not required to supply a narrative statement regarding their usability goals, usability metrics, 3rd party test results, or roadmap.

6 COST PROPOSAL – 20% of Total Score

6.1 General instructions on preparing cost proposals

The cost proposal should be submitted in a separate envelope with the written proposal. The proposal will be scored using a standard quantitative calculation where the most points will be awarded to the proposal with the lowest cost. Various costing methodologies and models are available to analyze the cost information submitted to determine the lowest costs to the State. The UWS will select one method and use it consistently throughout its analysis. The cost methodology will be available at the time that the proposals are due.
6.2 Format for submitting cost proposals

Cost Proposals should be submitted in accordance with the instructions in Appendix B. The University of Wisconsin System, Office of Procurement, however, reserves the right to request any additional information deemed necessary for the proper evaluation of proposals.

6.3 Fixed price proposal evaluation period

All prices, costs, and conditions outlined in the proposal shall remain fixed and valid for acceptance for ninety (90) calendar days starting on the due date for proposals.

7 SPECIAL CONTRACT TERMS AND CONDITIONS

By signing the Request for Proposal Form, Proposer agrees to the following Special Terms and Conditions of RFP unless exception is taken in writing.

7.1 PERFORMANCE AUDITS:
UWS reserves the right to conduct in-depth periodic performance audits in all areas of services required (i.e., pricing, delivery, fill rate, etc.) throughout the term of the resultant contract award. The Contractor shall provide all documentation necessary for the performance audit, as requested by UWS. Failure to satisfactorily meet performance requirements may result in contract cancellation and disqualification of contractor for future contracts.

7.2 TERMINATION:
UWS may terminate the contract at any time at its sole discretion by delivering 180 days' written notice to the contractor. Upon termination, UWS's liability will be limited to the pro rata cost of the services performed as of the date of termination. In the event that the contractor terminates the contract, for any reason whatsoever, it will refund to the agency within 30 days of said termination, all payments made hereunder by UWS to the contractor for work not completed or not accepted by UWS. Such termination will require written notice to that effect to be delivered by the contractor to UWS.

7.3 SUPPORT:
Proposer shall designate a person (and an alternate) to provide on-going communication with UWS institutions, coordinate servicing, answer questions and expedite deliveries. If the contact person varies for each UWS institution based on geographic location, please so state.

7.4 TOLL-FREE NUMBERS:
Respondent must provide toll-free telephone access and an electronic mail address for representatives of UW System to use when contacting the vendor.

7.5 MINORITY BUSINESS PROGRAM
The State of Wisconsin is committed to the promotion of minority business in the state's purchasing program and a goal of placing 5% of its total purchasing dollars with certified minority businesses. Authority for this program is found in ss. 15.107(2), 16.75(4), 16.75(5) and 560.036(2), Wisconsin Statutes. The contracting agency is committed to the promotion of minority business in the state's purchasing program.

The State of Wisconsin policy provides that minority-owned business enterprises certified by the Wisconsin Department of Commerce, Bureau of Minority Business Development should have the maximum opportunity to participate in the performance of its contracts. The supplier/contractor is strongly urged to use due diligence to further this policy by awarding subcontracts to minority-owned business enterprises or by using such enterprises to provide goods and services incidental to this agreement, with a goal of awarding at least 5% of the contract price to such enterprises.

The supplier/contractor shall furnish appropriate quarterly information about its effort to achieve this goal, including the identities of such enterprises certified by the Wisconsin Department of Commerce and their contract amount.

A listing of certified minority businesses, as well as the services and commodities they provide, is available from the Department of Administration, Office of the Minority Business Program, 608/267-7806. The listing is published on the Internet at: http://www.doa.state.wi.us/dsas/mbe/index.asp.

7.6 EXECUTED CONTRACT TO CONSTITUTE ENTIRE AGREEMENT

In the event of contract award, the contents of this RFP (including all attachments), RFP addenda and revisions, and the proposal of the successful proposer, and additional terms agreed to, in writing, by the agency and the contractor shall become part of the contract. Failure of the successful proposer to accept these as a contractual agreement may result in a cancellation of the award.

The following priority for contract documents will be used if there are conflicts or disputes.

Official Purchase Orders
Vendor's Proposal Dated February 28, 2017
UWS Request for Proposal Dated January 25, 2017
Standard Terms and Conditions

8 STANDARD TERMS AND CONDITIONS

The UWS reserves the right to incorporate standard State contract provisions into any contract negotiated with any proposal submitted responding to this RFP (Standard Terms and Conditions (DOA-3054)). Failure of the successful proposer to accept these obligations in a contractual agreement may result in cancellation of the award.
Standard Terms And Conditions
(Request For Bids / Proposals)

1.0 SPECIFICATIONS: The specifications in this request are the minimum acceptable. When specific manufacturer and model numbers are used, they are to establish a design, type of construction, quality, functional capability and/or performance level desired. When alternates are bid/proposed, they must be identified by manufacturer, stock number, and such other information necessary to establish equivalency. The State of Wisconsin shall be the sole judge of equivalency. Bidders/proposers are cautioned to avoid bidding alternates to the specifications which may result in rejection of their bid/proposal.

2.0 DEVIATIONS AND EXCEPTIONS: Deviations and exceptions from original text, terms, conditions, or specifications shall be described fully, on the bidder's/proposer's letterhead, signed, and attached to the request. In the absence of such statement, the bid/proposal shall be accepted as in strict compliance with all terms, conditions, and specifications and the bidders/proposers shall be held liable.

3.0 QUALITY: Unless otherwise indicated in the request, all material shall be first quality. Items which are used, demonstrators, obsolete, seconds, or which have been discontinued are unacceptable without prior written approval by the State of Wisconsin.

4.0 QUANTITIES: The quantities shown on this request are based on estimated needs. The state reserves the right to increase or decrease quantities to meet actual needs.

5.0 DELIVERY: Deliveries shall be F.O.B. destination freight prepaid and included unless otherwise specified.

6.0 PRICING AND DISCOUNT: The State of Wisconsin qualifies for governmental discounts and its educational institutions also qualify for educational discounts. Unit prices shall reflect these discounts.

6.1 Unit prices shown on the bid/proposal or contract shall be the price per unit of sale (e.g., gal., cs., doz., ea.) as stated on the request or contract. For any given item, the quantity multiplied by the unit price shall establish the extended price, the unit price shall govern in the bid/proposal evaluation and contract administration.

6.2 Prices established in continuing agreements and term contracts may be lowered due to general market conditions, but prices shall not be subject to increase for ninety (90) calendar days from the date of award. Any increase proposed shall be submitted to the contracting agency thirty (30) calendar days before the proposed effective date of the price increase, and shall be limited to fully documented cost increases to the contractor which are demonstrated to be industry wide. The conditions under which price increases may be granted shall be expressed in bid/proposal documents and contracts or agreements.

6.3 In determination of award, discounts for early payment will only be considered when all other conditions are equal and when payment terms allow at least fifteen (15) days, providing the discount terms are deemed favorable. All payment terms must allow the option of net thirty (30).

7.0 UNFAIR SALES ACT: Prices quoted to the State of Wisconsin are not governed by the Unfair Sales Act.

8.0 ACCEPTANCE-REJECTION: The State of Wisconsin reserves the right to accept or reject any or all bids/proposals, to waive any technicality in any bid/proposal submitted, and to accept any part of a bid/proposal as deemed to be in the best interests of the State of Wisconsin. Bids/proposals MUST be date and time stamped by the soliciting purchasing office on or before the date and time that the bid/proposal is due. Bids/proposals date and time stamped in another office will be rejected. Receipt of a bid/proposal by the mail system does not constitute receipt of a bid/proposal by the purchasing office.

9.0 METHOD OF AWARD: Award shall be made to the lowest responsible, responsive bidder unless otherwise specified.

10.0 ORDERING: Purchase orders or releases via purchasing cards shall be placed directly to the contractor by an authorized agency. No other purchase orders are authorized.

11.0 PAYMENT TERMS AND INVOICING: The State of Wisconsin normally will pay properly submitted vendor invoices within thirty (30) days of receipt providing goods and/or services have been delivered, installed (if required), and accepted as specified.

Invoices presented for payment must be submitted in accordance with instructions contained on the purchase order including reference to purchase order number and submittal to the correct address for processing.

A good faith dispute creates an exception to prompt payment.

12.0 TAXES: The State of Wisconsin and its agencies are exempt from payment of all federal tax and Wisconsin state and local taxes on its purchases except Wisconsin excise taxes as described below.

The State of Wisconsin, including all its agencies, is required to pay the Wisconsin excise or occupation tax on its purchase of beer, liquor, wine, cigarettes, tobacco products, motor vehicle fuel and general aviation fuel. However, it is exempt from payment of Wisconsin sales or use tax on its purchases. The State of Wisconsin may be subject to other states' taxes on its purchases in that state depending on the laws of that state. Contractors performing construction activities are required to pay state use tax on the cost of materials.

13.0 GUARANTEED DELIVERY: Failure of the contractor to adhere to delivery schedules as specified or to promptly replace rejected materials shall render the contractor liable for all costs in excess of the contract price when alternate procurement is necessary. Excess costs shall include the administrative costs.

14.0 ENTIRE AGREEMENT: These Standard Terms and Conditions shall apply to any contract or order awarded as a result of this request except where special requirements are stated elsewhere in the request; in such cases, the special requirements shall apply. Further, the written
contract and/or order with referenced parts and attachments shall constitute the entire agreement and no other terms and conditions in any document, acceptance, or acknowledgment shall be effective or binding unless expressly agreed to in writing by the contracting authority.

15.0 APPLICABLE LAW AND COMPLIANCE: This contract shall be governed under the laws of the State of Wisconsin. The contractor shall at all times comply with and observe all federal and state laws, local laws, ordinances, and regulations which are in effect during the period of this contract and which in any manner affect the work or its conduct. The State of Wisconsin reserves the right to cancel this contract if the contractor fails to follow the requirements of s. 77.66, Wis. Stats., and related statutes regarding certification for collection of sales and use tax. The State of Wisconsin also reserves the right to cancel this contract with any federally debarred contractor or a contractor that is presently identified on the list of parties excluded from federal procurement and non-procurement contracts.

16.0 ANTITRUST ASSIGNMENT: The contractor and the State of Wisconsin recognize that in actual economic practice, overcharges resulting from antitrust violations are in fact usually borne by the State of Wisconsin (purchaser). Therefore, the contractor hereby assigns to the State of Wisconsin any and all claims for such overcharges as to goods, materials or services purchased in connection with this contract.

17.0 ASSIGNMENT: No right or duty in whole or in part of the contractor under this contract may be assigned or delegated without the prior written consent of the State of Wisconsin.

18.0 WORK CENTER CRITERIA: A work center must be certified under s. 16.752, Wis. Stats., and must ensure that when engaged in the production of materials, supplies or equipment or the performance of contractual services, not less than seventy-five percent (75%) of the total hours of direct labor are performed by severely handicapped individuals.

19.0 NONDISCRIMINATION / AFFIRMATIVE ACTION: In connection with the performance of work under this contract, the contractor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in s. 51.01(5), Wis. Stats., sexual orientation as defined in s. 111.32(13m), Wis. Stats., or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Except with respect to sexual orientation, the contractor further agrees to take affirmative action to ensure equal employment opportunities.

19.1 Contracts estimated to be over twenty-five thousand dollars ($25,000) require the submission of a written affirmative action plan by the contractor. An exemption occurs from this requirement if the contractor has a workforce of less than twenty-five (25) employees. Within fifteen (15) working days after the contract is awarded, the contractor must submit the plan to the contracting state agency for approval. Instructions on preparing the plan and technical assistance regarding this clause are available from the contracting state agency.

19.2 The contractor agrees to post in conspicuous places, available for employees and applicants for employment, a notice to be provided by the contracting state agency that sets forth the provisions of the State of Wisconsin's nondiscrimination law.

19.3 Failure to comply with the conditions of this clause may result in the contractor's becoming declared an "ineligible" contractor, termination of the contract, or withholding of payment.

20.0 PATENT INFRINGEMENT: The contractor selling to the State of Wisconsin the articles described herein guarantees the articles were manufactured or produced in accordance with applicable federal labor laws. Further, that the sale or use of the articles described herein will not infringe any United States patent. The contractor covenants that it will at its own expense defend every suit which shall be brought against the State of Wisconsin (provided that such contractor is promptly notified of such suit) and all papers therein are delivered to it for any alleged infringement of any patent by reason of the sale or use of such articles, and agrees that it will pay all costs, damages, and profits recoverable in any such suit.

21.0 SAFETY REQUIREMENTS: All materials, equipment, and supplies provided to the State of Wisconsin must comply fully with all safety requirements as set forth by the Wisconsin Administrative Code and all applicable OSHA Standards.

22.0 WARRANTY: Unless otherwise specifically stated by the bidder/proposer, equipment purchased as a result of this request shall be warranted against defects by the bidder/proposer, equipment purchased as a result of this bid for one (1) year from date of receipt. The equipment manufacturer's standard warranty shall apply as a minimum and must be honored by the contractor.

23.0 INSURANCE RESPONSIBILITY: The contractor performing services for the State of Wisconsin shall:

23.1 Maintain worker's compensation insurance as required by Wisconsin Statutes, for all employees engaged in the work.

23.2 Maintain commercial liability, bodily injury and property damage insurance against any claim(s) which might occur in carrying out this agreement/contract. Minimum coverage shall be one million dollars ($1,000,000) liability for bodily injury and property damage including products liability and completed operations. Provide motor vehicle insurance for all owned, non-owned and hired vehicles that are used in carrying out this contract. Minimum coverage shall be one million dollars ($1,000,000) per occurrence combined single limit for automobile liability and property damage.

23.3 The state reserves the right to require higher or lower limits where warranted.

24.0 CANCELLATION: The State of Wisconsin reserves the right to cancel any contract in whole or in part without penalty due to nonappropriation of funds or for failure of the contractor to comply with terms, conditions, and specifications of this contract.
25.0 VENDOR TAX DELINQUENCY: Vendors who have a delinquent Wisconsin tax liability may have their payments offset by the State of Wisconsin.

26.0 PUBLIC RECORDS ACCESS: It is the intention of the state to maintain an open and public process in the solicitation, submission, review, and approval of procurement activities. Bid/proposal openings are public unless otherwise specified. Records may not be available for public inspection prior to issuance of the notice of intent to award or the award of the contract.

27.0 PROPRIETARY INFORMATION: Any restrictions on the use of data contained within a request, must be clearly stated in the bid/proposal itself. Proprietary information submitted in response to a request will be handled in accordance with applicable State of Wisconsin procurement regulations and the Wisconsin public records law. Proprietary restrictions normally are not accepted. However, when accepted, it is the vendor's responsibility to defend the determination in the event of an appeal or litigation.

27.1 Data contained in a bid/proposal, all documentation provided therein, and innovations developed as a result of the contracted commodities or services cannot be copyrighted or patented. All data, documentation, and innovations become the property of the State of Wisconsin.

27.2 Any material submitted by the vendor in response to this request that the vendor considers confidential and proprietary information and which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or material which can be kept confidential under the Wisconsin public records law, must be identified on a Designation of Confidential and Proprietary Information form (DOA-3027). Bidders/proposers may request the form if it is not part of the Request for Bid/Request for Proposal package. Bid/proposal prices cannot be held confidential.

28.0 DISCLOSURE: If a state public official (s. 19.42, Wis. Stats.), a member of a state public official's immediate family, or any organization in which a state public official or a member of the official's immediate family owns or controls a ten percent (10%) interest, is a party to this agreement, and if this agreement involves payment of more than three thousand dollars ($3,000) within a twelve (12) month period, this contract is voidable by the state unless appropriate disclosure is made according to s. 19.45(6), Wis. Stats., before signing the contract. Disclosure must be made to the State of Wisconsin Ethics Board, 44 East Mifflin Street, Suite 601, Madison, Wisconsin 53703 (Telephone 608-266-6123).

State classified and former employees and certain University of Wisconsin faculty/staff are subject to separate disclosure requirements, s. 16.417, Wis. Stats.

29.0 RECYCLED MATERIALS: The State of Wisconsin is required to purchase products incorporating recycled materials whenever technically and economically feasible. Bidders are encouraged to bid products with recycled content which meet specifications.

30.0 MATERIAL SAFETY DATA SHEET: If any item(s) on an order(s) resulting from this award(s) is a hazardous chemical, as defined under 29CFR 1910.1200, provide one (1) copy of a Material Safety Data Sheet for each item with the shipped container(s) and one (1) copy with the invoice(s).

31.0 PROMOTIONAL ADVERTISING / NEWS RELEASES: Reference to or use of the State of Wisconsin, any of its departments, agencies or other subunits, or any state official or employee for commercial promotion is prohibited. News releases pertaining to this procurement shall not be made without prior approval of the State of Wisconsin. Release of broadcast e-mails pertaining to this procurement shall not be made without prior written authorization of the contracting agency.

32.0 HOLD HARMLESS: The contractor will indemnify and save harmless the State of Wisconsin and all of its officers, agents and employees from all suits, actions, or claims of any character brought for or on account of any injuries or damages received by any persons or property resulting from the operations of the contractor, or of any of its contractors, in prosecuting work under this agreement.

33.0 FOREIGN CORPORATION: A foreign corporation (any corporation other than a Wisconsin corporation) which becomes a party to this Agreement is required to conform to all the requirements of Chapter 180, Wis. Stats., relating to a foreign corporation and must possess a certificate of authority from the Wisconsin Department of Financial Institutions, unless the corporation is transacting business in interstate commerce or is otherwise exempt from the requirement of obtaining a certificate of authority. Any foreign corporation which desires to apply for a certificate of authority should contact the Department of Financial Institutions, Division of Corporation, P. O. Box 7846, Madison, WI 53707-7846; telephone (608) 261-7577.

34.0 WORK CENTER PROGRAM: The successful bidder/proposer shall agree to implement processes that allow the State agencies, including the University of Wisconsin System, to satisfy the State's obligation to purchase goods and services produced by work centers certified under the State Use Law, s.16.752, Wis. Stat. This shall result in requiring the successful bidder/proposer to include products provided by work centers in its catalog for State agencies and campuses or to block the sale of comparable items to State agencies and campuses.

35.0 FORCE MAJEURE: Neither party shall be in default by reason of any failure in performance of this Agreement in accordance with reasonable control and without fault or negligence on their part. Such causes may include, but are not restricted to, acts of nature or the public enemy, acts of the government in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes and unusually severe weather, but in every case the failure to perform such must be beyond the reasonable control and without the fault or negligence of the party.
Supplemental Standard Terms and Conditions
for Procurements for Services

1.0 ACCEPTANCE OF BID/PROPOSAL CONTENT: The contents of the bid/proposal of the successful contractor will become contractual obligations if procurement action ensues.

2.0 CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: By signing this bid/proposal, the bidder/proposer certifies, and in the case of a joint bid/proposal, each party thereto certifies as to its own organization, that in connection with this procurement:

2.1 The prices in this bid/proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other bidder/proposer or with any competitor;

2.2 Unless otherwise required by law, the prices which have been quoted in this bid/proposal have not been knowingly disclosed by the bidder/proposer and will not knowingly be disclosed by the bidder/proposer prior to opening in the case of an advertised procurement or prior to award in the case of a negotiated procurement, directly or indirectly to any other bidder/proposer or to any competitor; and

2.3 No attempt has been made or will be made by the bidder/proposer to induce any other person or firm to submit or not to submit a bid/proposal for the purpose of restricting competition.

2.4 Each person signing this bid/proposal certifies that: He/she is the person in the bidder's/proposer's organization responsible within that organization for the decision as to the prices being offered herein and that he/she has not participated, and will not participate, in any action contrary to 2.1 through 2.3 above; (or)

He/she is not the person in the bidder's/proposer's organization responsible within that organization for the decision as to the prices being offered herein, but that he/she has been authorized in writing to act as agent for the persons responsible for such decisions in certifying that such persons have not participated, and will not participate in any action contrary to 2.1 through 2.3 above, and as their agent does hereby so certify; and he/she has not participated, and will not participate, in any action contrary to 2.1 through 2.3 above.

3.0 DISCLOSURE OF INDEPENDENCE AND RELATIONSHIP:

3.1 Prior to award of any contract, a potential contractor shall certify in writing to the procuring agency that no relationship exists between the potential contractor and the procuring or contracting agency that interferes with fair competition or is a conflict of interest, and no relationship exists between the contractor and another person or organization that constitutes a conflict of interest with respect to a state contract. The Department of Administration may waive this provision, in writing, if those activities of the potential contractor will not be adverse to the interests of the state.

3.2 Contractors shall agree as part of the contract for services that during performance of the contract, the contractor will neither provide contractual services nor enter into any agreement to provide services to a person or organization that is regulated or funded by the contracting agency or has interests that are adverse to the contracting agency. The Department of Administration may waive this provision, in writing, if those activities of the contractor will not be adverse to the interests of the state.

4.0 DUAL EMPLOYMENT: Section 16.417, Wis. Stats., prohibits an individual who is a State of Wisconsin employee or who is retained as a contractor full-time by a State of Wisconsin agency from being retained as a contractor by the same or another State of Wisconsin agency where the individual receives more than $12,000 as compensation for the individual's services during the same year. This prohibition does not apply to individuals who have full-time appointments for less than twelve (12) months during any period of time that is not included in the appointment. It does not include corporations or partnerships.

5.0 EMPLOYMENT: The contractor will not engage the services of any person or persons now employed by the State of Wisconsin, including any department, commission or board thereof, to provide services relating to this agreement without the written consent of the employing agency of such person or persons and of the contracting agency.

6.0 CONFLICT OF INTEREST: Private and non-profit corporations are bound by ss. 180.0831, 180.1911(1), and 181.0831 Wis. Stats., regarding conflicts of interests by directors in the conduct of state contracts.

7.0 RECORDKEEPING AND RECORD RETENTION: The contractor shall establish and maintain adequate records of all expenditures incurred under the contract. All records must be kept in accordance with generally accepted accounting procedures. All procedures must be in accordance with federal, state and local ordinances.

The contracting agency shall have the right to audit, review, examine, copy, and transcribe any pertinent records or documents relating to any contract resulting from this bid/proposal held by the contractor. The contractor will retain all documents applicable to the contract for a period of not less than three (3) years after final payment is made.

8.0 INDEPENDENT CAPACITY OF CONTRACTOR: The parties hereto agree that the contractor, its officers, agents, and employees, in the performance of this agreement shall act in the capacity of an independent contractor and not as an officer, employee, or agent of the state. The contractor agrees to take such steps as may be necessary to ensure that each subcontractor of the contractor will be deemed to be an independent contractor and will not be considered or permitted to be an agent, servant, joint venturer, or partner of the state.

9.0 REQUIRED FORMS
The following forms must be completed and submitted with the proposal in accordance with the instructions given in Section 2.4. Blank forms are attached.

Designation of Confidential and Proprietary Information (DOA-3027)
Vendor Information (DOA-3477)
Vendor Reference (DOA-3478)
Affidavit
Cooperative Purchasing Form (DOA-3333)
DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

The attached material submitted in response to Bid/Proposal RG-17-2663 includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released without our written approval.

Prices always become public information when bids/proposals are opened, and therefore cannot be kept confidential.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:
1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

We request that the following pages not be released

<table>
<thead>
<tr>
<th>Section</th>
<th>Page #</th>
<th>Topic</th>
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<tbody>
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IN THE EVENT THE DESIGNATION OF CONFIDENTIALITY OF THIS INFORMATION IS CHALLENGED, THE UNDERSIGNED HEREBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF CONFIDENTIALITY AND AGREES TO HOLD THE STATE HARMLESS FOR ANY COSTS OR DAMAGES ARISING OUT OF THE STATE'S AGREEING TO WITHHOLD THE MATERIALS.

Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The state considers other markings of confidential in the bid/proposal document to be insufficient. The undersigned agrees to hold the state harmless for any damages arising out of the release of any materials unless they are specifically identified above.

Company Name ___________________________________________

Authorized Representative ___________________________________________

Authorized Representative ___________________________________________

Date ___________________________________________

This document can be made available in accessible formats to qualified individuals with disabilities.
**VENDOR INFORMATION**

1. **BIDDING / PROPOSING COMPANY NAME**
   
   FEIN
   
   **Phone** (  )
   **Toll Free Phone** (  )
   **FAX** (  )
   **E-Mail Address**
   
   **Address**
   **City**
   **State**
   **Zip + 4**

2. **Name the person to contact for questions concerning this bid / proposal.**
   
   **Name**
   **Title**
   **Phone** (  )
   **Toll Free Phone** (  )
   **FAX** (  )
   **E-Mail Address**
   
   **Address**
   **City**
   **State**
   **Zip + 4**

3. **Any vendor awarded over $25,000 on this contract must submit affirmative action information to the department. Please name the Personnel / Human Resource and Development or other person responsible for affirmative action in the company to contact about this plan.**
   
   **Name**
   **Title**
   **Phone** (  )
   **Toll Free Phone** (  )
   **FAX** (  )
   **E-Mail Address**
   
   **Address**
   **City**
   **State**
   **Zip + 4**

4. **Mailing address to which state purchase orders are mailed and person the department may contact concerning orders and billings.**
   
   **Name**
   **Title**
   **Phone** (  )
   **Toll Free Phone** (  )
   **FAX** (  )
   **E-Mail Address**
   
   **Address**
   **City**
   **State**
   **Zip + 4**

5. **CEO / President Name**

   This document can be made available in accessible formats to qualified individuals with disabilities.
FOR VENDOR:  

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for four (4) or more installations with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Address (include Zip + 4)</th>
<th>Contact Person</th>
<th>Phone No.</th>
<th>Product(s) and/or Service(s) Used</th>
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This document can be made available in accessible formats to qualified individuals with disabilities.
This completed affidavit must be submitted with the bid/proposal.

Proposer Preference: Please indicate below if claiming a proposer preference.

☐ Minority Business Preference (s 16.75(3m), Wis. Stats.) - Must be certified by the Wisconsin Department of Commerce. If you have questions concerning the certification process, contact the Wisconsin Department of Commerce, 8th Floor, 123 W. Washington Ave., P.O. Box 7970, Madison, Wisconsin 53707-7970, (608) 267-9550.

☐ Work Center Preference (s 16.752, Wis Stats.) - Must be certified by the State of Wisconsin Use Board. If you have questions concerning the certification process, contact the Wisconsin State Use Board, 101 East Wilson Street, 6th Floor, PO Box 7867, Madison, Wisconsin 53707-7867 or 608/266-2553.

American-Made Materials: The materials covered in our proposal were manufactured in whole or in substantial part within the United States, or the majority of the component parts thereof were manufactured in whole or in substantial part in the United States.

☐ Yes ☐ No ☐ Unknown

Non-Collusion: In signing this proposal we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free trade; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer competitor or potential competitor; that this proposal has not been knowingly disclosed prior to opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

We will comply with all terms, conditions, and specifications required by the State of Wisconsin in this Announcement of Bid/Proposal and the terms of our bid/proposal.

Authorized Representative
Type or Print

Authorized Representative

Date (mm/dd/ccyy)

Signature

Company Name

Telephone ( )

This document can be made available in accessible formats to qualified individuals with disabilities.
Vendor Agreement

Wisconsin’s Cooperative Purchasing Service

Wisconsin statutes (s. 16.73, Wis. Stats.) establish authority to allow Wisconsin municipalities to purchase from state contracts. Participating in the service gives vendors opportunities for additional sales without additional bidding. Municipalities use the service to expedite purchases. A “municipality” is defined as any county, city, village, town, school district, board of school directors, sewer district, drainage district, vocational, technical and adult education district, or any other public body having the authority to award public contracts (s. 16.70(8), Wis. Stats.). Federally recognized Indian tribes and bands in this state may participate in cooperative purchasing with the state or any municipality under ss. 66.0301(1) and (2), Wis.Stats.

Interested municipalities:

- will contact the contractor directly to place orders referencing the state agency contract number; and
- are responsible for receipt, acceptance, inspection of commodities directly from the contractor, and making payment directly to the contractor.

The State of Wisconsin is not a party to these purchases or any dispute arising from these purchases and is not liable for delivery or payment of any of these purchases.

The State of Wisconsin will determine the contractor’s participation by checking a box below.

- **MANDATORY**: Bidders/Proposers must agree to furnish the commodities or services of this bid/proposal to Wisconsin municipalities. Vendors should note any special conditions below.

- **OPTIONAL**: Bidders/Proposers may or may not agree to furnish the commodities or services of this bid/proposal to Wisconsin municipalities. A vendor’s decision on participating in this service has no effect on awarding this contract.

A vendor in the service may specify minimum order sizes by volume or dollar amount, additional charges beyond normal delivery areas, or other minimal changes for municipalities.

Vendor: please check one of the following boxes in response.

- [ ] I Agree to furnish the commodities or services of this bid/proposal to Wisconsin municipalities with any special conditions noted below.
- [ ] I Do Not Agree to furnish the commodities or services to Wisconsin municipalities.

<table>
<thead>
<tr>
<th>Special Conditions (if applicable):</th>
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<table>
<thead>
<tr>
<th>Signature</th>
<th>Date (mm/dd/ccyy)</th>
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<tbody>
<tr>
<td>Name (Type or Print)</td>
<td>Title</td>
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<tr>
<td>Company</td>
<td>Telephone</td>
</tr>
<tr>
<td>Address (Street)</td>
<td>City</td>
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<tr>
<td></td>
<td>State</td>
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<td></td>
<td>ZIP + 4</td>
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<tr>
<td>Commodity/Service</td>
<td>Request for Bid/Proposal Number</td>
</tr>
</tbody>
</table>

RG-17-2663
Appendix A

List of
University of Wisconsin System Institutions

University of Wisconsin – Colleges

Includes:

- UW Baraboo/Sauk County
- UW Barron County
- UW Fond du Lac
- UW Fox Valley
- UW Manitowoc
- UW Marathon County
- UW Marinette
- UW Marshfield/Wood County
- UW Richland
- UW Rock County
- UW Sheboygan
- UW Washington County
- UW Waukesha

University of Wisconsin – Eau Claire
University of Wisconsin – Green Bay
University of Wisconsin – La Crosse
- University of Wisconsin – Madison (not included in resulting award)
University of Wisconsin – Milwaukee
University of Wisconsin – Oshkosh
University of Wisconsin – Parkside
University of Wisconsin – Platteville
University of Wisconsin – River Falls
University of Wisconsin – Stevens Point
University of Wisconsin – Stout
University of Wisconsin – Superior
University of Wisconsin – Whitewater

University of Wisconsin – Extension

University of Wisconsin System Administration
Appendix B

Cost Proposal Form

University of Wisconsin System, Office of Procurement
RFP Number: RG-17-2663

Please provide the following:

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Years 4-5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initiation, Set-Up, or Membership Fees</strong></td>
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<tr>
<td><strong>Enterprise Software, Annual Fee</strong></td>
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<tr>
<td><strong>Custom Services: Annual Fee</strong></td>
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<tr>
<td><strong>Additional Products or Services Required For Proposed Solution to Function As Proposed (Itemize and Describe)</strong></td>
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<tr>
<td><strong>Additional Recommended but not Required Products or Services (Itemize and Describe)</strong></td>
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<tr>
<td><strong>All Other Charges and Fees (Itemize and Describe)</strong></td>
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<tr>
<td><strong>Proposed Cap on License, Fee, Subscription, or Service Increases: Years 6-7</strong></td>
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</tbody>
</table>

TOTAL FIRST Year COST of Proposed Solution $ ______________________
TOTAL 3 Year COST of Proposed Solution $ ______________________
TOTAL 5 Year COST of Proposed Solution $ ______________________
TOTAL 7 Year COST of Proposed Solution $ ______________________