



SYSTEM™

REQUEST FOR PROPOSAL

RFP No.752-17-0926MA
E-Forms SOLUTION

Bid Submittal Deadline: [Wednesday, November 16th, 2016 at 3:00 PM Local Time](#)

The University of North Texas System

Prepared By:

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October 26th, 2016

REQUEST FOR PROPOSAL

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SECTION 1

INTRODUCTION

1.1 UNIVERSITY SYSTEM DESCRIPTION

The University of North Texas System (UNTS) serves the North Texas area and is comprised of three component institutions in addition to UNT System Administration in Dallas. Component institutions include: UNT Health Science Center in Fort Worth, UNT Dallas and UNT Denton. During academic year 2005-16, more than 40,000 students were enrolled in undergraduate, graduate and professional programs. System enrollment is expected to continue to grow over the next several years.

1.2 BACKGROUND

The UNTS on behalf of its component institutions desires to receive proposals for eForm solutions that will integrate with its current ERP, Oracle's PeopleSoft and possibly other data sources to aid customers in the need for an eForms solution across all applications. A solution is needed that will provide a shorter delivery time to production for critical administrative needs. When completed, this project will provide administrative offices with a solution that allows them to be more agile, reduce paper forms, and create substantial efficiencies across the organization. UNTS is looking for a simple user interface, while delivering a high degree of automation, integration, and improved business processes and workflows.

1.3 Group Purchase Authority

Texas law authorizes institutions of higher education (defined by Section 61.003, Education Code) to use the group purchasing procurement method (ref. Sections 51.9335, 73.115, and 74.008, Education Code). Additional Texas institutions of higher education may therefore elect to enter into a contract with the successful Proposer under this Section

SECTION 2

NOTICE TO PROPOSER

2.1 Submittal Deadline

University will accept proposals submitted in response to this RFP until 3:00 p.m., Local Time on Wednesday, November 16th, 2016 (the "**Submittal Deadline**").

2.2 University Contact Person

Proposers will direct all questions or concerns regarding this RFP to the following University contact ("**University Contact**"):

Michael Abernethy, Senior Director for Procurement Services
Email: Michael.abernethy@untsystem.edu

University specifically instructs all interested parties to restrict all contact and questions regarding this RFP to written communications forwarded to University Contact via the following link: <http://bsc.untsystem.edu/content/bid-inquiry>.

UNTS Contact must receive all questions or concerns no later than 5:00 PM Local Time, Monday, November 7th, 2016. University will have a reasonable amount of time to respond to questions or concerns. It is University's intent to respond to all appropriate questions and concerns; however, University reserves the right to decline to respond to any question or concern.

2.3 Criteria for Selection

The successful Proposer, if any, selected by University in accordance with the requirements and specifications set forth in this RFP will be the Proposer that submits a proposal in response to this RFP on or before the Submittal Deadline that is the most advantageous to University. The successful Proposer is referred to as the "**Contractor.**"

Proposer is encouraged to propose terms and conditions offering the maximum benefit to UNTS as outlined below. Proposers should describe all educational, state and local government discounts, as well as any other applicable discounts that may be available to University in a contract for the Services.

An evaluation team from UNTS will evaluate proposals. The evaluation of proposals and the selection of Contractor will be based on the information provided by Proposer in its proposal. University may give consideration to additional information if University deems such information relevant.

The criteria to be considered by UNTS in evaluating proposals and selecting Contractor, will be the following factors:

- Overall cost for the UNTS to implement and maintain the solution;
- Ease of use of the workflow designer;
- Proposer's project management team;
- Proposer's project plan, methodology and timeline to implement solution;
- References similar to the University of North Texas System;
- Quality and thoroughness of proposal.

2.4 Key Events Schedule

Issuance of RFP	October 26, 2016
Pre-Submittal Conference (Ref. Section 2.6 of this RFP)	November 3, 2016, 10:00 AM Local Time
Deadline for Questions/Concerns (Ref. Section 2.2 of this RFP)	November 7, 2016, 2016, 5:00 PM Local

Submittal Deadline
(Ref. **Section 2.1** of this RFP)

November 16, 2016, 3:00 PM Local Time

2.5 Historically Underutilized Businesses

In accordance with Texas Gov't Code §2161.252 and Texas Administrative Code §20.14, each state agency (including institutions of higher education) as defined by §2151.002 that considers entering into a contract with an expected value of \$100,000 or more shall, before the agency solicits bids, proposals, offers, or other applicable expressions of interest, determine whether subcontracting opportunities are probable under the contract.

If subcontracting opportunities are probable, each state agency's invitation for bids or other purchase solicitation documents for construction, professional services, other services, and commodities with an expected value of \$100,000 or more shall state that probability and require a HUB Subcontracting Plan (HSP).

FAILURE TO SUBMIT AN HSP WITH YOUR RESPONSE MAY RESULT IN THE DISQUALIFICATION F YOUR PROPOSAL. Information regarding the UNTS's HUB Program and associated forms may be found at: <https://www.untsystem.edu/hr-it-business-services/hub-forms>. For questions regarding the HUB Program or submittal of your HSP, vendors may contact either Greg Obar, Associate Director, HUB Program at Russell.Obar@untsystem.edu or Kimmalla Mitchell, HUB Specialist at Kimmalla.Mitchell@untsystem.edu.

2.6 Pre-Submittal Conference

A preproposal conference will be held **on November 3, 2016, at 10:00 AM Local Time** in Room 4202A of the University of North Texas System Business Service Center located at 1112 Dallas Drive, Denton, Texas 76205. Interested vendors are highly encouraged to attend.

SECTION 3

SUBMISSION OF PROPOSAL

3.1 Number of Copies

Proposer must submit one (1) complete original copy of its *entire* proposal. An *original* signature by an authorized officer of Proposer must appear on the Execution of Offer (ref. **Section 2** of **APPENDIX ONE**) of submitted proposal. The Proposer's proposal bearing an original signature should contain the mark "original" on the front cover of the proposal.

The University does not consider electronic signatures to be valid therefore the original signature must be a "wet signature."

Proposer must submit one (1) complete copy of the *entire* proposal electronically on a USB Flash Drive. The USB Flash Drive must include a protective cover and be labeled with Proposer's name and RFP number.

In addition, Proposer must submit one (1) additional electronic copy of the proposal on a USB Flash Drive in which all proposed pricing information, provided in response to **Section 6**, has been removed.

3.2 Submission

Proposals must be received by University on or before the Submittal Deadline (ref. **Section 2.1** of this RFP) and should be delivered to:

University of North Texas System
Procurement Services
Business Service Center
1112 Dallas Drive, Suite 4000
Denton, TX 76205

Request for Proposal number and submittal date in the lower left-hand corner of sealed bid envelope (box/container).

Proposals must be typed on letter-size (8-1/2" x 11") paper, and must be submitted in a 3-ring binder. Preprinted material should be referenced in the proposal and included as labeled attachments. Sections within a proposal should be divided by tabs for ease of reference.

3.3 Proposal Validity Period

Each proposal must state that it will remain valid for University's acceptance for a minimum of one hundred and twenty (120) days after the Submittal Deadline, to allow time for evaluation, selection, and any unforeseen delays.

3.4 Terms and Conditions

3.4.1 Proposer must comply with the requirements and specifications contained in this RFP, including the Agreement (ref. **APPENDIX ONE**), the Notice to Proposer (ref. **Section 2** of this RFP), Proposal Requirements (ref. **APPENDIX ONE**) and the Specifications and Additional Questions (ref. **Section 7** of this RFP). If there is a conflict among the provisions in this RFP, the provision requiring Proposer to supply the better quality or greater quantity of services will prevail, or if such conflict does not involve quality or quantity, then interpretation will be in the following order of precedence:

- 3.4.1.1 Specifications and Additional Questions (ref. **Section 5 and Attachment B** of this RFP);
- 3.4.1.2 (Not used);
- 3.4.1.3 Proposal Requirements (ref. **APPENDIX ONE**);

3.4.1.4 Notice to Proposers (ref. **Section 2** of this RFP).

3.5 Submittal Checklist

Proposer is instructed to complete, sign, and return the following documents as a part of its proposal. If Proposer fails to return each of the following items with its proposal, then University may reject the proposal:

- 3.5.1 Signed and Completed Execution of Offer (ref. **Section 2** of **APPENDIX ONE**)
- 3.5.2 Signed and Completed HUB Subcontracting Plan. (ref. **Section 2.5** of this RFP) .
PLEASE SUBMIT THIS INFORMATION IN A SEPARATE ENVELOPE.
- 3.5.3 Responses to Proposer's General Questionnaire (ref. **Section 3** of **APPENDIX ONE**) **AND SECTION 7.**
- 3.5.4 Signed and Completed Addenda Checklist (ref. Section 4 of **APPENDIX ONE**)
- 3.5.5 Responses to questions on Attachment B.

SECTION 4

GENERAL TERMS AND CONDITIONS

The UNTS's standard procurement terms and conditions may be found at: http://bsc.untsystem.edu/sites/default/files/BSC_PO_terms_072015_0.pdf. If a proposer takes exception to any of these terms and conditions those exceptions should be stated and located in a separate section of the vendor's response marked "Exceptions." Proposers are advised that should the UNTS not accept a stated exception it may result in disqualification of your proposal.

NOTE: Exceptions cannot be taken to the RFP document itself, nor can it be redlined. These actions may result in Proposer's disqualification.

- 4.1 If Proposer takes exception to any terms or conditions set forth in the Agreement (ref. **APPENDIX ONE**), Proposer must submit a list of the exceptions with proposal.

Section 5

SCOPE OF SERVICES

5.1 ERP Environment

The ERP technology solution used by UNTS is Oracle's PeopleSoft applications, including Student Administration, Finance (including Grants Management and Supply Chain Management), Human Capital Management, and Interaction Hub (Portal). See **Attachment A** for current application/technology release levels and modules.

5.2 Requirements/Deliverables:

5.2.2 General Requirements

E-forms: Solution should have an easy to use forms designer/builder tool, which doesn't require IT staff to create and deliver new basic forms for customer use. Description of the setups required by the users and expected skillset for the user who will be creating the forms;

5.2.3 Capability should include some type of digital signature;

5.2.4 For more complex forms, must be able to fully integrate with PeopleSoft or other various external database will be required; i.e. push/pull data. This will include pre-population of required data fields from PeopleSoft, where appropriate (i.e. student info from entering an identification number), and for field value selection and editing; as well as ability to update PeopleSoft tables with data collected in the form.

5.2.5 Must also describe the various options for how integrations could be done with proposed solution;

5.2.6 Must be able to authenticate using LDAP. The use of role-based security is desired;

5.2.7 Must have ability to report and monitor usage of e-forms by application administrator for effectiveness and auditing purposes.

5.3 Workflow:

5.3.1 Solution must have an easy to use workflow designer and be capable of integrating/updating external data base tables;

5.3.2 Must be easily configurable by functional super-users;

5.3.3 Must be able to capture workflow approvals for reporting and audit purposes.

5.4 Deliverables:

The deliverables requested are comprised of the following major components:

5.4.1 Product/Solution.

Response to this RFP should adequately describe how the delivered product/solution will meet (or not) each of the objectives and requirements established, herein, reference **Attachment B**.

Successful response to this RFP will not only include information on how requirements are addressed but also include features of the product that provide additional capabilities. Analytical data from the solutions that measures usage, effectiveness of communications and other metrics providing insight, while not required, are considered highly desirable.

5.4.2 Implementation Services.

Response should describe what professional services will be required to implement the product/solution including project management, staffing, and effort required.

5.4.3 Training:

Training must be provided to technical staff and a set of functional super-users in the use, maintenance, and support of the solution.

5.4.4 Project Management:

Project Management will be performed by the vendor. UNTS will provide a resource that will function as the facilitator for UNTS and as a liaison to the vendor's project manager. Standard project management methodologies are

expected to be employed for the project. A high-level project plan and propose timeline must be provided.

5.4.5 Documentation and Knowledge Transfer.

The completed product should be documented as to design, customization and uses, such that UNTS technology staff can maintain and enhance the product going forward. Time should be built into the scope of work to complete not only the documentation of that effort but also to provide face-to-face knowledge transfer allowing for understanding that includes time for Q&A. Respondent will describe the process that will take place to complete this deliverables

5.5 ESTIMATED COST

Cost estimations should include software, licensing fees, services, maintenance, warranty, installation, training, delivery/shipping and/or any other associated costs.

Requirements for travel and expenses are to be defined separately. If included in the hourly rates, these must be itemized separately, explicitly stated and specifying the portion of the rate that is for expenses. If rates are different for on-site vs. remote, this must be explicitly stated. Pricing information should include the following:

- Software licensing cost, including pricing basis (i.e. FTE, named licenses, etc.)
- Yearly maintenance for year 1, and subsequent four years if available;
- Enterprise licensing option to cover all business units within the UNT System; and total cost;
- Implementation cost for the software, including training.

Attachment A – Current UNTS Application/Technology

Product	Current Application Release	Current Technology Release
Campus Solutions	9.0	PeopleTools 8.54.26 (in December 2016)
Campus Solutions modules include: Admissions and Recruitment, Student Records, Student Financials, Financial Aid, Gradebook, Self Service, Academic Advising		
Human Capital Management	9.2	PeopleTools 8.54.26
HCM modules include: Payroll, Benefits Administration, Human Resources, eProfile, eDevelopment, Time and Labor, Candidate Gateway, Talent Acquisition, ePerformance, Self-Service		
Financial Management	9.2	PeopleTools 8.54.22
Financials modules include: General Ledger, Payables, Receivables, Billing, Asset Management, Commitment Control, Purchasing, eProcurement, Grants, Contracts, Project Costing, and Travel		
Interaction Hub	9.2	PeopleTools 8.54.16

Attachment B - Software Questionnaire

#	Question (ANSWER ANY QUESTIONS THAT ARE NOT COVERED IN ABOVE SECTIONS)	Tick as Appropriate
	Software Details	
1	What Database Management System does your software require, if on-premise?	
	a. ORACLE	<input type="checkbox"/>
	b. MS SQL Server	<input type="checkbox"/>
	b. Oracle/Spatial option	<input type="checkbox"/>
	c. Other (Please Specify) _____	<input type="checkbox"/>
2	What Operating System(s) are required for the software to run, if on-premise?	
	Client Server	
	a. UNIX (Please Specify Version) _____ _____	<input type="checkbox"/>
	b. WINDOWS (Please Specify Version) _____ _____	<input type="checkbox"/>
	c. LINUX (Please Specify Version) _____ _____	<input type="checkbox"/>
	d. WINDOWS NT (Please Specify Version) _____ _____	<input type="checkbox"/>
	e. Other OS (Please Specify Name/Version) _____ _____	<input type="checkbox"/>
3	What architecture does your software use?	
	a. Client/Server	<input type="checkbox"/>
	b. LAN	<input type="checkbox"/>
	c. Web-based	<input type="checkbox"/>
	e. Other (Please Specify) _____	<input type="checkbox"/>
4	Will the source code be provided upon purchase of the software?	Yes No <input type="checkbox"/> <input type="checkbox"/>
5	How long has the proposed software version been available for use?	
	a. Under 1 year	<input type="checkbox"/>
	b. 1-3 years	<input type="checkbox"/>
	c. Above 3 years (Please Specify) _____	<input type="checkbox"/>
6	How often are patch/fixes released on the software	
	a. Monthly	<input type="checkbox"/>
	b. Quarterly	<input type="checkbox"/>
	c. Other (Please Specify) _____	<input type="checkbox"/>
7	What browsers does the software support? (IE, Chrome, Safari, FireFox....)	

9	Does the software support the use of SAML authentication?	Yes No <input type="checkbox"/> <input type="checkbox"/>
10	Does the software support the use of LDAP authentication?	Yes No <input type="checkbox"/> <input type="checkbox"/>
11	Do you provide a report writer/query facility with the software?	Yes No <input type="checkbox"/> <input type="checkbox"/>
12	Is the software provided with:	Yes No
	a. On-line help facility	<input type="checkbox"/> <input type="checkbox"/>
	b. Context-sensitive help facility	<input type="checkbox"/> <input type="checkbox"/>
13	What development tools are provided with the software (Please Specify Below)	

APPENDIX ONE

AFFIRMATIONS AND CONFIRMATIONS

1.1 Purpose

UMTS is soliciting competitive sealed proposals from Proposers having suitable qualifications and experience providing services in accordance with the terms, conditions and requirements set forth in this RFP. This RFP provides sufficient information for interested parties to prepare and submit proposals for consideration by UNTS.

By submitting a proposal, Proposer certifies that it understands this RFP and has full knowledge of the scope, nature, quality, and quantity of the services to be performed, the detailed requirements of the services to be provided, and the conditions under which such services are to be performed. Proposer also certifies that it understands that all costs relating to preparing a response to this RFP will be the sole responsibility of the Proposer.

PROPOSER IS CAUTIONED TO READ THE INFORMATION CONTAINED IN THIS RFP CAREFULLY AND TO SUBMIT A COMPLETE RESPONSE TO ALL REQUIREMENTS AND QUESTIONS AS DIRECTED.

1.2 Inquiries and Interpretations

UNTS may in its sole discretion respond in writing to written inquiries concerning this RFP and mail its response as an Addendum to all parties recorded by University as having received a copy of this RFP. Only University's responses that are made by formal written Addenda will be binding on University. Any verbal responses, written interpretations or clarifications other than Addenda to this RFP will be without legal effect. All Addenda issued by University prior to the Submittal Deadline will be and are hereby incorporated as a part of this RFP for all purposes.

Proposers are required to acknowledge receipt of each Addendum as specified in this Section. The Proposer must acknowledge all Addenda by completing, signing and returning the Addenda Checklist in Section 2 of this appendix. The Addenda Checklist must be received by University prior to the Submittal Deadline and should accompany the Proposer's proposal.

Any interested party that receives this RFP by means other than directly from University is responsible for notifying UNTS that it has received an RFP package, and should provide its name, address, telephone number and FAX number to University, so that if University issues Addenda to this RFP or provides written answers to questions, that information can be provided to such party.

1.3 Public Information

Proposer is hereby notified that University strictly adheres to all statutes, court decisions and the opinions of the Texas Attorney General with respect to disclosure of public information.

University may seek to protect from disclosure all information submitted in response to this RFP until such time as a final agreement is executed.

Upon execution of a final agreement, University will consider all information, documentation, and other materials requested to be submitted in response to this RFP, to be of a non-confidential and non-proprietary nature and, therefore, subject to public disclosure under the *Texas Public Information Act (Government Code, Chapter 552.001, et seq.)*. Proposer will be advised of a request for public information that implicates their materials and will have the opportunity to raise any objections to disclosure to the Texas Attorney General. Certain information may be protected from release under Sections 552.101, 552.110, 552.113, and 552.131, *Government Code*.

1.4 Type of Agreement

(Not Used).

1.5 Proposal Evaluation Process

University will select Contractor by using the competitive sealed proposal process described in this Section.

University may make the selection of Contractor on the basis of the proposals initially submitted, without discussion, clarification or modification. In the alternative, University may make the selection of Contractor on the basis of negotiation with any of the Proposers. In conducting such negotiations, University will use commercially reasonable efforts to avoid disclosing the contents of competing proposals.

At University's sole option and discretion, University may discuss and negotiate elements of proposals submitted with any or all proposers at the University's sole discretion.

After submission of a proposal but before final selection of Contractor is made, University may permit a Proposer to revise its proposal in order to obtain the Proposer's best and final offer. In that event, representations made by Proposer in its revised proposal, including price and fee quotes, will be binding on Proposer. University will provide each Proposer within the competitive range with an equal opportunity for discussion and revision of its proposal. University is not obligated to select the Proposer offering the most attractive economic terms if that Proposer is not the most advantageous to University overall, as determined by University.

University reserves the right to (a) enter into an agreement for all or any portion of the requirements and specifications set forth in this RFP with one or more Proposers, (b) reject any and all proposals and re-solicit proposals, or (c) reject any and all proposals and temporarily or permanently abandon this selection process, if deemed to be in the best interests of University. Proposer is hereby notified that University will maintain in its files concerning this RFP a written record of the basis upon which a selection, if any, is made by University.

1.6 Proposer's Acceptance of Evaluation Methodology

By submitting a proposal, Proposer acknowledges (1) Proposer's acceptance of [a] the Proposal Evaluation Process (ref. **Section 1.5 of APPENDIX ONE**), [b] the Criteria for Selection (ref. **2.3** of this RFP), [c] the Specifications and , [d] the terms and all other requirements and specifications set forth in this RFP; and (2) Proposer's recognition that some subjective judgments must be made by University during this RFP process.

1.7 Solicitation for Proposal and Proposal Preparation Costs

Proposer understands and agrees that (1) this RFP is a solicitation for proposals and University has made no representation written or oral that one or more agreements with University will be awarded under this RFP; (2) University issues this RFP predicated on University's anticipated requirements for the Services, and University has made no representation, written or oral, that any particular scope of services will actually be required by University; and (3) Proposer will bear, as its sole risk and responsibility, any cost that arises from Proposer's preparation of a proposal in response to this RFP.

1.8 Proposal Requirements and General Instructions

1.8.1 Proposer should carefully read the information contained herein and submit a complete proposal in response to all requirements and questions as directed.

1.8.2 Proposals and any other information submitted by Proposer in response to this RFP will become the property of University.

1.8.3 University will not provide compensation to Proposer for any expenses incurred by the Proposer for proposal preparation or for demonstrations or oral presentations that may be made by Proposer. Proposer submits its proposal at its own risk and expense.

1.8.4 Proposals that (i) are qualified with conditional clauses; (ii) alter, modify, or revise this RFP in any way; or (iii) contain irregularities of any kind, are subject to disqualification by University, at University's sole discretion.

1.8.5 Proposals should be prepared simply and economically, providing a straightforward, concise description of Proposer's ability to meet the requirements and specifications of this RFP. Emphasis should be on completeness, clarity of content, and responsiveness to the requirements and specifications of this RFP.

1.8.6 University makes no warranty or guarantee that an award will be made as a result of this RFP. University reserves the right to accept or reject any or all proposals, waive any formalities, procedural requirements, or minor technical inconsistencies, and delete any requirement or specification from this RFP or the Agreement when deemed to be in University's best interest. University reserves the right to seek clarification from any Proposer concerning any item contained in its proposal prior to final selection. Such clarification may be provided by telephone conference or personal meeting with or writing to University, at University's sole discretion. Representations made by Proposer within its proposal will be binding on Proposer.

1.8.7 Any proposal that fails to comply with the requirements contained in this RFP may be rejected by University, in University's sole discretion.

1.9 Preparation and Submittal Instructions

1.9.1 Specifications and Additional Submittal Information

Proposals must include responses to the questions in Specifications and Additional Questions (ref. **Section 5.4** of this RFP). Proposer should reference the item number and repeat the question in its response. In cases where a question does not apply or if unable to respond, Proposer should refer to the item number, repeat the question, and indicate N/A (Not Applicable) or N/R (No Response), as appropriate. Proposer should explain the reason when responding N/A or N/R. **NOTE: PROPOSERS ARE ASKED TO SUBMIT INFORMATION FROM QUESTIONS IN SECTION 7.7 IN A SEPARATE ENVELOPE.**

1.9.2 Execution of Offer

Proposer must complete, sign and return the attached Execution of Offer (ref. **Section 2** of **APPENDIX ONE**) as part of its proposal. The Execution of Offer must be signed by a representative of Proposer duly authorized to bind the Proposer to its proposal. Any proposal received without a completed and signed Execution of Offer may be rejected by University, in its sole discretion.

1.9.3 Pricing and Delivery Schedule

Proposer must complete and return the Pricing and Delivery Schedule (ref. **Section 6** of this RFP), as part of its proposal. In the Pricing and Delivery Schedule, the Proposer should describe in detail (a) the total fees for the entire scope of the Services; and (b) the method by which the fees are calculated. The fees must be inclusive of all associated costs for delivery, labor, insurance, taxes, overhead, and profit.

University will not recognize or accept any charges or fees to perform the Services that are not specifically stated in the Pricing and Delivery Schedule.

In the Pricing and Delivery Schedule, Proposer should describe each significant phase in the process of providing the Services to University, and the time period within which Proposer proposes to be able to complete each such phase.

1.9.4 Proposer's General Questionnaire

Proposals must include responses to the questions in Section 7. Proposer should reference the item number and repeat the question in its response. In cases where a question does not apply or if unable to respond, Proposer should refer to the item number, repeat the question, and indicate N/A (Not Applicable) or N/R (No Response), as appropriate. Proposer should explain the reason when responding N/A or N/R.

1.9.5 Addenda Checklist

Proposer should acknowledge all Addenda to this RFP (if any) by completing, signing and returning the Addenda Checklist (ref. **Section 4** of **APPENDIX ONE**) as part of its proposal. Any proposal received without a completed and signed Addenda Checklist may be rejected by University, in its sole discretion.

1.9.6 Submission

Proposer should submit all proposal materials enclosed in a sealed envelope, box, or container. The RFP No. (ref. **Section 1.3** of this RFP) and the Submittal Deadline (ref. **Section 2.1** of this RFP) should be clearly shown in the lower left-hand corner on the top surface of the container. In addition, the name and the return address of the Proposer should be clearly visible.

Proposer must also submit the number of originals of the HUB Subcontracting Plan (also called the HSP) as required by this RFP (ref. **Section 2.5** of the RFP.)

Upon Proposer's request and at Proposer's expense, University will return to a Proposer its proposal received after the Submittal Deadline if the proposal is properly identified. University will not under any circumstances consider a proposal that is received after the Submittal Deadline or which is not accompanied by the number of completed and signed originals of the HSP that are required by this RFP.

University will not accept proposals submitted by telephone, proposals submitted by Facsimile ("FAX") transmission, or proposals submitted by electronic transmission (i.e., e-mail) in response to this RFP.

Except as otherwise provided in this RFP, no proposal may be changed, amended, or modified after it has been submitted to University. However, a proposal may be withdrawn and resubmitted at any time prior to the Submittal Deadline. No proposal may be withdrawn after the Submittal Deadline without University's consent, which will be based on Proposer's submittal of a written explanation and documentation evidencing a reason acceptable to University, in University's sole discretion.

By signing the Execution of Offer (ref. **Section 2** of **APPENDIX ONE**) and submitting a proposal, Proposer certifies that any terms, conditions, or documents attached to or referenced in its proposal are applicable to this

procurement only to the extent that they (a) do not conflict with the laws of the State of Texas or this RFP and (b) do not place any requirements on University that are not set forth in this RFP or in the Appendices to this RFP. Proposer further certifies that the submission of a proposal is Proposer's good faith intent to enter into the Agreement with University as specified herein and that such intent is not contingent upon University's acceptance or execution of any terms, conditions, or other documents attached to or referenced in Proposer's proposal.

1.9.7 Page Size, Binders, and Dividers

Proposals must be typed on letter-size (8-1/2" x 11") paper, and must be submitted in a binder. Preprinted material should be referenced in the proposal and included as labeled attachments. Sections within a proposal should be divided by tabs for ease of reference.

1.9.8 Table of Contents

Proposals must include a Table of Contents with page number references. The Table of Contents must contain sufficient detail and be organized according to the same format as presented in this RFP, to allow easy reference to the sections of the proposal as well as to any separate attachments (which should be identified in the main Table of Contents). If a Proposer includes supplemental information or non-required attachments with its proposal, this material should be clearly identified in the Table of Contents and organized as a separate section of the proposal.

1.9.9 Pagination

All pages of the proposal should be numbered sequentially in Arabic numerals (1, 2, 3, etc.). Attachments should be numbered or referenced separately.

SECTION 2

EXECUTION OF OFFER

THIS EXECUTION OF OFFER MUST BE COMPLETED, SIGNED AND RETURNED WITH PROPOSER'S PROPOSAL. FAILURE TO COMPLETE, SIGN AND RETURN THIS EXECUTION OF OFFER WITH THE PROPOSER'S PROPOSAL MAY RESULT IN THE REJECTION OF THE PROPOSAL.

- 2.1 By signature hereon, Proposer represents and warrants the following:
- 2.1.1 Proposer acknowledges and agrees that (1) this RFP is a solicitation for a proposal and is not a contract or an offer to contract; (2) the submission of a proposal by Proposer in response to this RFP will not create a contract between University and Proposer; (3) University has made no representation or warranty, written or oral, that one or more contracts with University will be awarded under this RFP; and (4) Proposer will bear, as its sole risk and responsibility, any cost arising from Proposer's preparation of a response to this RFP.
 - 2.1.2 Proposer is a reputable company that is lawfully and regularly engaged in providing the Services.
 - 2.1.3 Proposer has the necessary experience, knowledge, abilities, skills, and resources to perform the Services.
 - 2.1.4 Proposer is aware of, is fully informed about, and is in full compliance with all applicable federal, state and local laws, rules, regulations and ordinances.
 - 2.1.5 Proposer understands (i) the requirements and specifications set forth in this RFP and (ii) the terms and conditions set forth in the Agreement under which Proposer will be required to operate.
 - 2.1.6 If selected by University, Proposer will not delegate any of its duties or responsibilities under this RFP or the Agreement to any sub-contractor, except as expressly provided in the Agreement.
 - 2.1.7 If selected by University, Proposer will maintain any insurance coverage as required by the Agreement during the term thereof.
 - 2.1.8 All statements, information and representations prepared and submitted in response to this RFP are current, complete, true and accurate. Proposer acknowledges that University will rely on such statements, information and representations in selecting Contractor. If selected by University, Proposer will notify University immediately of any material change in any matters with regard to which Proposer has made a statement or representation or provided information.
 - 2.1.9 PROPOSER WILL DEFEND WITH COUNSEL APPROVED BY UNIVERSITY, INDEMNIFY, AND HOLD HARMLESS UNIVERSITY, THE UNIVERSITY OF TEXAS SYSTEM, THE STATE OF TEXAS, AND ALL OF THEIR REGENTS, OFFICERS, AGENTS AND EMPLOYEES, FROM AND AGAINST ALL ACTIONS, SUITS, DEMANDS, COSTS, DAMAGES, LIABILITIES AND OTHER CLAIMS OF ANY NATURE, KIND OR DESCRIPTION, INCLUDING REASONABLE ATTORNEYS' FEES INCURRED IN INVESTIGATING, DEFENDING OR SETTLING ANY OF THE FOREGOING, ARISING OUT OF, CONNECTED WITH, OR RESULTING FROM ANY NEGLIGENT ACTS OR OMISSIONS OR WILLFUL MISCONDUCT OF PROPOSER OR ANY AGENT, EMPLOYEE, SUBCONTRACTOR, OR SUPPLIER OF PROPOSER IN THE EXECUTION OR PERFORMANCE OF ANY CONTRACT OR AGREEMENT RESULTING FROM THIS RFP.
 - 2.1.10 Pursuant to Sections 2107.008 and 2252.903, *Government Code*, any payments owing to Proposer under any contract or agreement resulting from this RFP may be applied directly to any debt or delinquency that Proposer owes the State of Texas or any agency of the State of Texas regardless of when it arises, until such debt or delinquency is paid in full.
- 2.2 By signature hereon, Proposer offers and agrees to furnish the Services to University and comply with all terms, conditions, requirements and specifications set forth in this RFP.
- 2.3 By signature hereon, Proposer affirms that it has not given or offered to give, nor does Proposer intend to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with its submitted proposal. Failure to sign this Execution of Offer, or signing with a false statement, may void the submitted proposal or any resulting contracts, and the Proposer may be removed from all proposal lists at University.
- 2.4 By signature hereon, Proposer certifies that it is not currently delinquent in the payment of any taxes due under Chapter 171, *Tax Code*, or that Proposer is exempt from the payment of those taxes, or that Proposer is an out-of-state taxable entity that is not subject to those taxes, whichever is applicable. A false certification will be deemed a material breach of any resulting contract or agreement and, at University's option, may result in termination of any resulting contract or agreement.
- 2.5 By signature hereon, Proposer hereby certifies that neither Proposer nor any firm, corporation, partnership or institution represented by Proposer, or anyone acting for such firm, corporation or institution, has violated the antitrust laws of the State of Texas, codified in Section 15.01, et seq., *Business and Commerce Code*, or the Federal antitrust laws, nor communicated directly or indirectly the proposal made to any competitor or any other person engaged in such line of business.

2.6 By signature hereon, Proposer certifies that the individual signing this document and the documents made a part of this RFP, is authorized to sign such documents on behalf of Proposer and to bind Proposer under any agreements and other contractual arrangements that may result from the submission of Proposer's proposal.

2.7 By signature hereon, Proposer certifies as follows:

"Under Section 231.006, *Family Code*, relating to child support, Proposer certifies that the individual or business entity named in the Proposer's proposal is not ineligible to receive the specified contract award and acknowledges that any agreements or other contractual arrangements resulting from this RFP may be terminated if this certification is inaccurate."

2.8 By signature hereon, Proposer certifies that (i) no relationship, whether by blood, marriage, business association, capital funding agreement or by any other such kinship or connection exists between the owner of any Proposer that is a sole proprietorship, the officers or directors of any Proposer that is a corporation, the partners of any Proposer that is a partnership, the joint venturers of any Proposer that is a joint venture or the members or managers of any Proposer that is a limited liability company, on one hand, and an employee of any component of The University of Texas System, on the other hand, other than the relationships which have been previously disclosed to University in writing; (ii) Proposer has not been an employee of any component institution of The University of Texas System within the immediate twelve (12) months prior to the Submittal Deadline; and (iii) no person who, in the past four (4) years served as an executive of a state agency was involved with or has any interest in Proposer's proposal or any contract resulting from this RFP (ref. Section 669.003, *Government Code*). All disclosures by Proposer in connection with this certification will be subject to administrative review and approval before University enters into a contract or agreement with Proposer.

2.9 By signature hereon, Proposer certifies its compliance with all federal laws and regulations pertaining to Equal Employment Opportunities and Affirmative Action.

2.10 By signature hereon, Proposer represents and warrants that all products and services offered to University in response to this RFP meet or exceed the safety standards established and promulgated under the Federal Occupational Safety and Health Law (Public Law 91-596) and the *Texas Hazard Communication Act*, Chapter 502, *Health and Safety Code*, and all related regulations in effect or proposed as of the date of this RFP.

2.11 Proposer will and has disclosed, as part of its proposal, any exceptions to the certifications stated in this Execution of Offer. All such disclosures will be subject to administrative review and approval prior to the time University makes an award or enters into any contract or agreement with Proposer.

2.12 If Proposer will sell or lease computer equipment to the University under any agreements or other contractual arrangements that may result from the submission of Proposer's proposal then, pursuant to Section 361.965(c), *Health & Safety Code*, Proposer certifies that it is in compliance with the Manufacturer Responsibility and Consumer Convenience Computer Equipment Collection and Recovery Act set forth in Chapter 361, Subchapter Y, *Health & Safety Code* and the rules adopted by the Texas Commission on Environmental Quality under that Act as set forth in Title 30, Chapter 328, Subchapter I, *Texas Administrative Code*. Section 361.952(2), *Health & Safety Code*, states that, for purposes of the Manufacturer Responsibility and Consumer Convenience Computer Equipment Collection and Recovery Act, the term "computer equipment" means a desktop or notebook computer and includes a computer monitor or other display device that does not contain a tuner.

2.13 **Proposer should complete the following information:**

If Proposer is a Corporation, then State of Incorporation: _____

If Proposer is a Corporation, then Proposer's Corporate Charter Number: _____

RFP No.: 752-17-0926MA, EForms Solution

NOTICE: WITH FEW EXCEPTIONS, INDIVIDUALS ARE ENTITLED ON REQUEST TO BE INFORMED ABOUT THE INFORMATION THAT GOVERNMENTAL BODIES OF THE STATE OF TEXAS COLLECT ABOUT SUCH INDIVIDUALS. UNDER SECTIONS 552.021 AND 552.023, *GOVERNMENT CODE*, INDIVIDUALS ARE ENTITLED TO RECEIVE AND REVIEW SUCH INFORMATION. UNDER SECTION 559.004, *GOVERNMENT CODE*, INDIVIDUALS ARE ENTITLED TO HAVE GOVERNMENTAL BODIES OF THE STATE OF TEXAS CORRECT INFORMATION ABOUT SUCH INDIVIDUALS THAT IS INCORRECT.

Submitted and Certified By:

(Proposer Institution's Name)

(Signature of Duly Authorized Representative)

(Printed Name/Title)

(Date Signed)

(Proposer's Street Address)

(City, State, Zip Code)

(Telephone Number)

(FAX Number)

(Email Address)

SECTION 3

PROPOSER'S GENERAL QUESTIONNAIRE

NOTICE: WITH FEW EXCEPTIONS, INDIVIDUALS ARE ENTITLED ON REQUEST TO BE INFORMED ABOUT THE INFORMATION THAT GOVERNMENTAL BODIES OF THE STATE OF TEXAS COLLECT ABOUT SUCH INDIVIDUALS. UNDER SECTIONS 552.021 AND 552.023, GOVERNMENT CODE, INDIVIDUALS ARE ENTITLED TO RECEIVE AND REVIEW SUCH INFORMATION. UNDER SECTION 559.004, GOVERNMENT CODE, INDIVIDUALS ARE ENTITLED TO HAVE GOVERNMENTAL BODIES OF THE STATE OF TEXAS CORRECT INFORMATION ABOUT SUCH INDIVIDUALS THAT IS INCORRECT.

Proposals must include responses to the questions contained in this Proposer's General Questionnaire. Proposer should reference the item number and repeat the question in its response. In cases where a question does not apply or if unable to respond, Proposer should refer to the item number, repeat the question, and indicate N/A (Not Applicable) or N/R (No Response), as appropriate. Proposer will explain the reason when responding N/A or N/R.

3.1 Proposer Profile

3.1.1 Legal name of Proposer company:

Address of principal place of business:

Address of office that would be providing service under the Agreement:

Number of years in Business: _____

State of incorporation: _____

Number of Employees: _____

Annual Revenues Volume: _____

Name of Parent Corporation, if any _____

NOTE: If Proposer is a subsidiary, University prefers to enter into a contract or agreement with the Parent Corporation or to receive assurances of performance from the Parent Corporation.

SECTION 4
ADDENDA CHECKLIST

Proposal of: _____
(Proposer Company Name)

To: The University of North Texas System

Ref.: E-Forms Solution

RFP No.: 752-17-0926MA

Ladies and Gentlemen:

The undersigned Proposer hereby acknowledges receipt of the following Addenda to the captioned RFP (initial if applicable).

Note: If there was only 1 Addendum, initial just the first blank after No. 1, not all 5 blanks below.

No. 1 _____ No. 2 _____ No. 3 _____ No. 4 _____ No. 5 _____

Respectfully submitted,

Proposer: _____

By: _____
(Authorized Signature for Proposer)

Name: _____

Title: _____

Date: _____