

**REQUEST FOR PROPOSAL**

**Campus Card Solution**

**RFP #23-0825**

**Issue Date: 08/25/2023**

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# **RFP ADMINISTRATIVE INFORMATION**

Issued: **08/25/2023**

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| RFP Title: | Campus Card Solution  |
| RFP Project Description: | Lewis-Clark State College (LC State) seeks proposals for a comprehensive “one card” campus card solution.  |
| RFP Lead: | Jessica Waddington, Purchasing DirectorLewis-Clark State College500 8th AveLewiston, ID 83501Jlwaddington@lcsc.eduPh: 208-792-2431 |
| Submitting Sealed Proposal:Submitting Manually:MANUAL PROPOSALS MUST BE RECEIVED AT THE PHYSICAL ADDRESS DESIGNATED FOR COURIER SERVICE AND TIME/DATE STAMPED BY THE DIVISION OF PURCHASING PRIOR TO THE CLOSING DATE AND TIME.Submit electronically to LC State via e-mail:  | Jessica Waddington, Purchasing DirectorLewis-Clark State CollegeAdministration Building rm. 104500 8th AveLewiston, ID 83501**Submit by: 10/6/2023 5:00 PM Pacific Time**Jlwaddington@lcsc.edu |
| LC State Purchasing website  | <https://www.lcsc.edu/purchasing/vendors/current-solicitations>All RFP information and updates will be posted here. |
| Pre-Proposal Virtual Conference Date/Time:Pre-Proposal Virtual Conference Location: | **9/1/2023 11 AM Pacific Time**RFP Lead will provide you with virtual conference information upon registration. Attendance is optional, pre-registration is required. |
| Deadline to Receive Questions: | **9/15/2023 5:00 PM Pacific Time** |
| Anticipated Release of Answers to Questions: | **9/22/2023 Pacific Time** |
| RFP Closing Date: | **10/6/2023 5:00 PM Pacific Time**  |
| Proposal Opening Date: | **10/9/2023 9:00 AM** Pacific Time, in Purchasing Department on the first business day following the Closing Date. (Opening will be completed virtually. Email RFP Leads for attendance details).  |
| Virtual Demonstration:  | Tentatively scheduled for **10/18/2023-10/20/2023** for offerors from whom a demonstration is requested. |
| Validity of Proposal:  | Proposals are to remain valid for **one hundred eighty (180)** calendar days after the scheduled RFP Closing Date. Proposals submitted with a validity period of less than this may be found non-responsive and may not be considered.  |
| Initial Term of Contract and Renewals: | Initial term of the contract will be for: Three (3) year initial term. Following the Initial Term, the parties may extend the Contract under the same terms and conditions, on an annual basis, upon mutual written consent for subsequent one-year periods (each a “Renewal Term”).  |
| **Lewis-Clark State college standard contract terms and conditions INCORPORATED BY REFERENCE: https://www.lcsc.edu/purchasing/vendors** |

# **Overview**

## Purpose

Lewis-Clark State College (LC State or the college) is requesting proposals for a comprehensive “One Card” campus card solution.

## Background Information

Lewis-Clark State College is in need of a comprehensive “One Card” campus card solution with all requisite tools, materials, software, and accessories, with preference given to a cloud-hosted system. The “One Card” system must provide seamless integration with the college’s existing student information system (Ellucian Colleague, utilizing Ellucian ethos for API integration) and other software/hardware used for various functions or provide a reasonable replacement.

# **pROCESS REQUIREMENTS**

## Restrictions on Communications

From the issue date of this RFP, until a contract is awarded, or the RFP is cancelled, Offerors are prohibited from communications regarding this RFP with LC State employees, evaluation committee members, or other associated individuals, except the RFP Lead.

## Pre-Proposal Conference

An optional pre-proposal virtual conference will be held at the location and time as indicated in the RFP Administration Information section, page 1 of this RFP. This will be your opportunity to ask the college questions via a virtual meeting. All parties interested are invited to participate. Those choosing to participate must pre-register via email to the RFP Lead, with the name and contact information of all participants. Parties interested are asked to register by the date indicated in the RFP Administration Information section. Any oral answers given by the college during the pre-proposal are unofficial, and will not be binding on the college. Questions asked during the pre-proposal conference are to be submitted in writing using Attachment 1, Offeror Questions. Conference attendance is at the participant’s own expense.

## Questions

* + 1. The RFP Lead is the only contact for this Solicitation. All correspondence must be in sent via e-mail. If it becomes necessary to revise any part of this RFP, amendments will be posted on LC State’s Purchasing website. It is the responsibility of parties interested in this RFP to monitor the LC State Purchasing website for any updates or amendments. Any oral interpretations or clarifications of this RFP must not be relied upon. All changes to this RFP will be in writing and must be posted to the LC State Purchasing website to be valid.

### Questions or other correspondence must be submitted in writing to the RFP Lead (see contact information in the RFP Administrative Information, page 1). QUESTIONS MUST BE RECEIVED BY THE DATE AND TIME LISTED IN THE RFP ADMINISTRATIVE INFORMATION SECTION.

### Written questions must be submitted using **Attachment 1 - Offeror Questions**. Official answers to all written questions will be posted on LC State Purchasing web page as an amendment to this RFP.

## Offeror Proposed Modifications and Exceptions to Requirements, Terms, and Conditions

* + 1. Offerors are strongly encouraged to submit any proposed modifications to the requirements, terms, or conditions of the RFP on **Attachment 1 - Offeror Questions** prior to the deadline to submit questions. Questions regarding these requirements must contain the following:
* The rationale for the specific requirement being unacceptable to the party submitting the question (define the deficiency).
* Recommended verbiage for LC State’s consideration that is consistent in content, context, and form with LC State’s requirement that is being questioned.
* Explanation of how LC State’s acceptance of the recommended verbiage is fair and equitable to both LC State and to the party submitting the question.
	+ 1. If a Proposal contains modifications or exceptions to any Solicitation requirements, terms, or conditions which are not addressed during the question-and-answer period, they must be identified and submitted on Attachment 2 - Modification and Exception Form and must contain the same information outlined in Section 2.2.1, above. LC State will not consider any modifications or exceptions that are not identified specifically on Attachment 2.
		2. LC State has sole discretion to determine if the modifications or exceptions submitted by an Offeror would result in a material change or otherwise threaten the integrity of the procurement process. Non-material modifications or exceptions may be discussed with the apparent successful Offeror, at the discretion of LC State; however, LC State shall have the right to reject any and all such modifications and/or exceptions, or to call an end to such discussions, and to instruct the Offeror to amend its Proposal and remove the modifications and/or exceptions. Failure to do so may result in LC State finding the Proposal non-responsive.
		3. Except as otherwise provided within the Solicitation, LC State will not consider modifications or exceptions to the requirements, terms, or conditions which are proposed after the RFP Closing Date.

## Proposals

* + 1. Proposals should be submitted on the most favorable terms an Offeror can propose, from both a price and technical standpoint, as well as with regard to legal terms and conditions. The college reserves the right to accept any part of a Proposal or reject all or any part of any Proposal received, without financial obligation, if the college determines it to be in the best interest of the college to do so.
		2. Discussions with individual Offerors (including the utilization of one or more rounds of Best And Final Offers (BAFO) and/or Negotiations) may be conducted as determined by the college to be in its best interest. Offerors should submit their best and most competitive cost proposal initially, as there is no guarantee that the college will conduct any discussions.
		3. No verbal Proposals or verbal modifications will be considered. An Offeror may modify its Proposal in writing prior to the RFP closing time. A written modification must include the date and signature of the Offeror or its authorized representative.
		4. Proposals that are qualified with conditional clauses or alterations or items not called for in the RFP documents, or irregularities of any kind, are subject to disqualification by the college at its option.
		5. All Proposal concepts and material submitted becomes the property of the college and will not be returned to Offeror unless the Solicitation is canceled by the University (State Code § 67-9215). Award or rejection of a Proposal does not affect this right. Proposals and supporting documentation may be available for public inspection upon written request following the announcement of a Contract award, except for information specifically labeled on each separate page as a “Trade Secret” under the Idaho Public Records Act, Section Title 74, Chapter 1, Idaho Code (“the Act”). Alternatively, information may be specifically labeled “exempt” from public records under another exemption found in the Act. Information specifically labeled as Trade Secret or otherwise exempt may be protected from disclosure, but only to the extent consistent with the Act or otherwise applicable federal or state law or regulation. Accordingly, the college cannot guarantee its confidentiality.

# **Instructions for Submission of Proposal**

The current version of LC State Standard Terms and Conditions are incorporated, by reference into this solicitation, and into any resulting contracts as if set forth in their entirety. Also incorporated by reference into this solicitation are Idaho Bills 189, 190, 191, and 294. LC State Standard Terms and Conditions are located at: <https://www.lcsc.edu/purchasing/vendors>. Failure by any submitting Offeror to review these documents will in no way constitute or be deemed a waiver by LC State of any term, condition or requirement contained in the referenced documents; and no liability will be assumed by LC State for a submitting Offeror’s failure to consider the LC State Standard Terms and Conditions in preparing its response to the solicitation.

## General Instructions

### Proposals may be submitted electronically or manually, as detailed below. Except as otherwise addressed in this solicitation, all submission materials must be submitted at the same time (in a single package or electronic submission). If multiple submissions are received, only the latest timely submission will be considered.

### Alternate proposals may be submitted and will be considered.

### All electronic files must be in PDF, Microsoft Word or Excel format; the only exception is for financials, brochures or other information only available in an alternate format.

## Public Records

### The Idaho Public Records Law, Idaho Code Sections 74-101 through 74-126, allows the open inspection and copying of public records. Public records include any writing containing information relating to the conduct or administration of the public's business prepared, owned, used, or retained by a State Agency or a local agency (political subdivision of the state of Idaho) regardless of the physical form or character. All, or most, of the information contained in your response will be a public record subject to disclosure under the Public Records Law. The Public Records Law contains certain exemptions. One exemption potentially applicable to part of your response may be for trade secrets.

### Prices that you provide in your Bid, Proposal or Quotation are not a trade secret. LC State, to the extent allowed by law and in accordance with these instructions, will honor a designation of nondisclosure. Any questions regarding the applicability of the Public Records Law should be addressed to your own legal counsel PRIOR TO SUBMISSION of your Bid, Proposal or Quotation.

## Redacted Information

If your Proposal contains information that you consider to be exempt, you must also submit a redacted copy of the Proposal with all exempt information removed or blacked out. The college will provide this redacted Proposal to requestors under the Public Records Law, if requested. Submitting Offerors must also:

###  Identify with particularity the precise text, illustration, or other information contained within each page marked “trade secret” (it is not sufficient to simply mark the entire page). The specific information you deem “trade secret” within each noted page must be highlighted, italicized, identified by asterisks, contained within a text border, or otherwise clearly delineated from other text/information and specifically identified as a “trade secret.”

### Provide a separate document entitled “List of Redacted Trade Secret Information” which provides a succinct list of all trade secret information noted in your Proposal; listed in the order it appears in your submittal documents, identified by Page #, Section #/Paragraph #, Title of Section/Paragraph, specific portions of text/illustrations; or in a manner otherwise sufficient to allow LC State’s procurement personnel to determine the precise text/material subject to the notation. Additionally, this list must identify with each notation the specific basis for your position that the material be treated as exempt from disclosure and how the exempting the material complies with the Public Records Law.

### Submit a redacted copy of the Proposal with all trade secret information removed or blacked out. The redacted copy must be submitted electronically, with the word “redacted” in the file name, whether the Proposal is submitted manually or electronically.

### Offeror shall indemnify and defend LC State against all liability, claims, damages, losses, expenses, actions, attorney fees and suits whatsoever for honoring a designation of exempt or for the Offeror’s failure to designate individual documents as exempt. The Offeror’s failure to designate as exempt any document or portion of a document that is released by LC State shall constitute a complete waiver of any and all claims for damages caused by any such release. If LC State receives a request for materials claimed exempt by the Offeror, the Offeror shall provide the legal defense for such claim.

## Electronic Submission

### Electronically submitted Proposals must be submitted to the email address identified in the RFP Administration Information Section. Remember to submit an additional redacted version of the proposal if you have identified trade secrets.

## Manual Submission

### The Proposal must be addressed to the RFP Lead, sealed, and identified as **“RFP #23-0825 CAMPUS CARD SOLUTION”**. Include your company name on the outside of the package. The Cost Proposal must be separately sealed, identified as “Cost Proposal - **RFP #23-0825 CAMPUS CARD SOLUTION”.** The Technical Proposal and separately sealed Cost Proposal must be submitted at the same time (place all proposal response materials within a larger package).

Each proposal must be submitted in one (1) original with five (5) copies of the Technical Proposal and one (1) original and one (1) copy of the Cost Proposal. Offerors submitting manually must also submit one (1) electronic copy of the proposal on USB

Device or via email. Word, PDF or Excel format is required (the only exception is for financials, brochures or other information only available in an alternate format). The format and content must be the same as the manually submitted proposal. The electronic version must NOT be password protected or locked in any way.

# **Proposal Format**

These instructions describe the format to be used when submitting a Proposal. The format is designed to ensure a complete submission of information necessary for an equitable analysis and evaluation of submitted Proposals. There is no intent to limit the content of Proposals.

## Evaluation Codes

**(M) Mandatory Response** - failure to respond to any (M) section, or to comply with any mandatory specification or requirement, will render Offeror’s Proposal non-responsive and no further evaluation will occur.

**(ME) Mandatory and Evaluated Response** - failure to respond to any (ME) section, or to comply with any mandatory specification or requirement in an (ME) section, will render Offeror’s Proposal non-responsive and no further evaluation will occur. Offeror must respond to these sections as directed; points will be awarded based on predetermined criteria.

**(E) Evaluated Response** - a response is desired and will be evaluated. If not available,

respond with “Not Available” or other response that identifies Offeror’s ability or inability to supply the

item or service. If Offeror cannot meet the requirement, or chooses not to respond for any reason, zero (0) points will be awarded for the section. If Offeror responds, points will be awarded based on predetermined criteria.

Note: Offerors are directed to IDAPA 38.05.01.074.03.a, as well as IDAPA 38.05.01.091.05, which allow

the designated LC State official to waive minor informalities as well as minor deviations. The

college also reserves the right to seek clarification on any M or ME requirement.

## Table of Contents

Include a table of contents in the Proposal identifying the contents of each section, including page numbers of major Sections.

## Format

**Proposals shall follow the numerical order of this RFP** starting at the beginning and continuing through to the end of the RFP. **Proposal sections and subsections must be identified with the corresponding numbers and headings used in this RFP. In the response, the RFP section and/or subsection must be restated, followed with the response.**

Offerors are encouraged to use a different color font, bold text, italics, or other indicator to clearly distinguish the RFP section from the Offeror’s response. Except for brochures, financials, work samples, or other similar submission items, all electronic Proposals must be submitted in Microsoft Word or Excel, or PDF format, and must not be locked. Offerors are strongly cautioned against including website links or imbedded documents in the Proposal; LC State will not be responsible for the RFP Lead or any evaluator’s failure to consider information outside of or imbedded in the Proposal.

# **Mandatory Submission Requirements**

The proposal begins with the mandatory items identified in this list and the following sections. **NOTE: THIS CHECKLIST IS PROVIDED AS A COURTESY ONLY; OFFERORS ARE RESPONSIBLE FOR SUBMITTING ALL MANDATORY SECTIONS, ATTACHMENTS, SUBMITTAL ITEMS, ETC., REGARDLESS OF WHETHER THEY ARE IDENTIFIED IN THIS LIST.**

**See section 4 for Proposal Format requirements.**

[ ]  (M) Cover Form: Complete, sign, and submit **Attachment 3, Cover Form.** All Proposals must be submitted with the completed and signed Attachment 3, Cover Form.

[ ]  (M) Acknowledgement of Amendments: If the RFP is amended, the Offeror must acknowledge each amendment with a signature on the acknowledgement form provided with each amendment. Failure to return a signed copy of each amendment acknowledgement form with the Proposal may result in the Proposal being found non-responsive. See IDAPA 38.05.01.52.

[ ]  **Section 6**: Provide response to all (M) and (ME) sections, and any other required submittal items.

[ ]  **Section 7**: Provide response to all (M) and (ME) sections, and any other required submittal items.

[ ]  **Section 8**: Provide response to all (M) and (ME) sections, and any other required submittal items.

[ ]  (ME) **Section 9** **Cost Proposal**: Provide your cost information on the form provided in Attachment 4.

[ ]  (M) Executive Summary: Include an executive summary in the Technical Proposal, providing a condensed overview of the contents of the Technical Proposal that demonstrates an understanding of the services to be provided.

[ ]  (M) Redacted copy of Proposal and list of Trade Secret redactions, as detailed in **Section 3, if applicable.**

[ ]  Review the required types and levels of insurance—these are mandatory requirements. If you do not already have the required types and levels of insurance, you are **strongly encouraged** to contact your insurance representative to find out if you will be able to obtain the required insurance. (The Offeror should not purchase additional insurance in reliance of being awarded a contract). If you are awarded a Contract, failure to provide proof of the required insurance will be grounds for termination of the Contract.

# **Business Information**

## (ME) Experience

Describe in detail your knowledge and experience in providing services similar to those required in this RFP. If possible, include a list of higher education institutions where you have provided similar services in the past 5 years. If your company has limited higher education experience, list experience that is as similar as possible.

## (ME) References

Provide contact information for three (3) references. LC State prefers to receive references from higher education institutions. If you have limited references from higher education, ask for references from entities as similar to higher education as possible. LC State reserves the right to contact your references by phone and/or email; and to contact other entities with whom your firm

has done business, whether or not they were provided as a reference.

## (ME) Business Profile

Provide a profile of your business including Offeror’s business history, description of current service area, and customer base.

## (M) Organizational Chart

Provide a copy of your organizational chart, including detail of any relationships with parent and subsidiary organizations.

## (ME) Demonstrated Success

Provide specific data demonstrating prior success with clients, preferably similar in institution size and demographics to LC State.

## (E) Customer Satisfaction

Provide up to 10 years of customer feedback as well as a summary of how your company utilizes that feedback to improve services.

# **Organization and Staffing**

Describe your qualifications to successfully complete the requirements of this RFP by providing a

detailed response to the following:

## Key Personnel (M)

### Provide a list of key management, customer service, and other personnel, and their qualifications to be used in the fulfillment of this contract.

### Provide resumes for employees who will be managing and/or directly providing services under the contract. Include a list of projects these individuals have worked on (with dates of engagement), a description of the project, and the role of each individual. For positions that are not filled, a position description (including requisite qualifications, certifications, and experience) must be provided. In the event the personnel identified initially for this project become reassigned or are no longer available to perform the requirements of this contract, Offeror shall be required to submit resumes to LC State for review and acceptance of personnel assuming the responsibilities of the project. The college reserves the right to reject a proposed replacement(s). If a proposed replacement is rejected, the Offeror shall put forward another individual(s) for review and acceptance.

## (M) Subcontractors

### If you intend to utilize subcontractors, describe the extent to which they will be used to comply with Contract requirements. Include each position providing service and provide a detailed description of how the subcontractors are anticipated to be involved under the Contract. Include a description of how the Offeror will ensure that all subcontractors and their employees will meet all Scope of Work requirements. NOTE: The information provided for subcontractors, if any, will be evaluated as part of Section 7.2, Other Key Personnel and Qualifications.

### If you do not intend to utilize subcontractor(s), provide a statement to that effect.

# **Scope of Work AND DELIVERABLES**

**All sections of the Scope of Work are required contract services.** This proposal outline is to be used in response to the RFP. Evaluators will be scoring the proposal based on the methodologies proposed and the completeness of the response to each item listed below. Offeror’s must describe in detail how each requirement will be met. Requirements are marked (M) or (ME) below. Offer should include personnel, proposed timelines, methodologies, and any pertinent information that will be required from the college in order to achieve full compliance with all tasks and deliverables.

## (ME) General Requirements

#### To increase the depth and breadth of its campus card solution, Lewis-Clark State College is in need of a comprehensive “One Card” campus card solution with all requisite tools, materials, software, and accessories, with preference given to a cloud-hosted system. The One Card system must provide seamless integration with existing SIS and other software/hardware used for various functions or provide a reasonable replacement.

## (M) Key Benefits

The offered campus card solution must include the following:

### Unlimited number of users, user types, database types, and database connections;

### Easy-to-use application allows quick access to data, minimizing data services workload;

### Timely and informed data-driven decisions in areas such as Student, Finance, Academics, Institutional Research, Human Resources, etc.;

### Accessible, updated basic system training, user manuals, and help features

### Cross-platform functionality (ability to integrate with other systems);

### Secure and scalable applications;

### Central management dashboards;

### Self-service options.

## (ME) Features, Capabilities and Controls

The Campus Card Solution must allow LC State to go beyond typical ID card production and operate a “one-card campus” where our constituents only need one card, their official College ID, for all functions. These functions must include, but are not limited to:

### Identification;

### Point of sale;

### Meal authorization;

### Attendance tracking;

### Provides a simple, expedient process for campus card production;

### Provides audit trails for all transactions;

### Includes a user-friendly means for reporting;

### Offers a management console that allows permissions to be segmented by user to allow for distribution of responsibilities based on need;

### Automated integration through Ellucian Ethos with Ellucian Colleague;

### Standard static reporting with report customization and delivery;

### Dynamic reporting with report customization and delivery;

### Supports single sign-on;

### **(E)** Configuring system functions is desired but not mandatory;

### **(E)** Allows use of mobile credentials via iOS and android devices is desired but not mandatory;

### **(E)** Provides web and mobile device access for user account management is desired but not mandatory;

### **(E)** Provide a solution to support student elections is desired but not mandatory.;

### **(E)** Access control is desired but not mandatory (however, LC State will entertain separating some functions if it best serves the college).

## (ME) One Card Capability

### LC State must be able to load funds on the card.

### LC State must be able to reduce the balance based on the student purchases.

### LC State must be able to integrate the card data with industry standards systems.

### Students must be able to use the card to get their prepaid meals from their selected meal plan;

#### Students must be able to use the card to spend their meal plan (swipes or various fund types);

#### Students must be able to use the card to check out Library Books;

#### Students must be able to use the card at printing stations;

#### Students must be able to use the card to access recreational equipment;

#### Students must be able to use the card to access gym and exercise facilities.

### Students must be able to show, swipe, and scan the card for entrance to athletic and entertainment events.

### Students must be able to use the card to pay for vending machine purchases.

### The card must entitle users to privileges including facilities use, access resources (tutoring, checkout equipment, and/or off-campus partners).

## (ME) Access Controls

### In the event that communications with the host are lost, the card reader must be able to automatically log transactions in an offline state. It must be able to upload logged transaction information to the host when communications are restored.

### Must provide error messages and diagnostic routines to help system operators troubleshoot problems with or without the assistance of supplier technical support.

### Must be user programmable from the host, or another card reader, as well as using its own keypad.

### Must restrict functions to authorized operators and management.

## (ME) System User Interface

The offered campus card solution must include the following:

### Allow system operators to add, change, and delete cardholders and cardholder information individually and by group (i.e., multiple updates) as necessary.

### Support multiple and various configurations of board and event verification plans.

### Include the option of creating multiple customer-defined fields.

### Allow the ability to design plans from the host or remote workstations via simple menu choices and without special programming.

### Allow quick views for cardholder history.

### Support the ability to add, delete, and change a cardholder’s access/account/plan.

### Provide detailed guidelines which walk an administrator through the process of creating or configuring system functions.

### Supports single sign-on.

## (ME) Integration

### System must allow for automated transfer of data to and from the ERP – Ellucian Colleague, with little to no end-user/programmer intervention.

### System must demonstrate compatibility with current program integrations and list load times when funds are added and when available for student use, funds must be available within 1 minute or less.

### Current program integrations include but are not limited to: Ethos, Oracle, POS, Freedom Pay, Pharos, mobile ordering app, student engagement software, performance ticketing.

## (ME) Database Administrative Functionality

### Must include an option for web-based administrative access to the system without the requirement of installing administrative software on a client machine, which must:

#### Allow the retrieval of automatically generated and stored reports.

#### Includes the ability to generate ad-hoc reports.

#### Allow user look up.

#### Allow the user to assign, edit and delete cardholder access.

#### **(E)** Ability to display emergency messages is desired but not mandatory.

## (ME) Task/Tool Scheduling

The offered campus card solution must include the following:

### Tools or tasks that, once designed/configured, can be scheduled to automatically update cardholder accounts and access.

### The ability to set up daily, weekly, and monthly schedules, as well as special schedules for end of semester options.

### The ability to perform these operations without operator intervention.

## (ME) Time Period Definition

The offered campus card solution must:

### Allow authorized operators/administrators to define time periods and names for accounting and reporting purposes.

### **(E)** Have the ability to define time periods to reflect the specific operating schedules of various facilities across campus, desired but not mandatory.

## (ME) Reporting Features

The offered campus card solution must:

### Generate reports and print them to the host or any remote workstation via screen, printer, or file.

### Produce a full variety of reports for tracking and analyzing demographics of campus card operations. Types of reports such as facility use, sales, errors, patrons, operation, activity, plans, and ad-hoc reports.

### Support a comprehensive set of pre-designed reports, to include declining balance, charge, and cash reports, plan reports, activity (privilege) reports, management reports, maintenance reports, membership reports, user reports, and historical reports.

### Custom reporting must allow the option to include customer-defined fields.

### Design customized standard report queues to be run at regular intervals (daily, weekly, monthly, and on user-specified occasions) without operator intervention.

### Generate all reports at any time without interrupting the online operation of the campus card system.

### Provide complete real-time information.

### Allow queries from any combination of cardholder information and transactions.

### Allow card photos to be used in reports.

### Allow use of a third party, industry standard report generator to generate customized reports.

## (ME) Cardholder Account Management

The offered campus card solution must:

### Be capable of expanding to support all current and future cardholder information in cardholder database.

### Support an unlimited number of cardholder plans, accounts, and privileges/access rights.

### Support the following types of accounts: board plans (multiple uses), bonus board plans, declining/stored value, bonus declining dollars, board plans with discretionary declining

### Ability to track cardholder accounts by ID.

### Settings must allow cardholder account balances to go negative, for selective transactions, (customer-controlled parameter) if uploaded logged transactions exceed the amount in the account.

### Include the ability to use a shadow account for enrichment purposes to track real money separately from incentive money.

### Include the ability to track all cardholder accounts and regulate transfers and rollovers from one account into another.

### Support a variety of privilege types including: yes/no, credit/debit, single/multi-use, attendance, check cashing, check-in/out.

### Support the ability to link user-defined groups of privileges to specific plans, to assign privileges to cardholders in any combination by individual or group, to “chain” activities so that cashiers or checkers do not need to know beforehand to which plan or activity to group a card. Group or role-based assignments.

### Support the ability to assign, suspend, revoke, and reactivate any privilege or package of privileges.

### Include the ability to authorize users to review up-to-the-minute cardholder biographical, account, and transaction histories from any authorized workstation.

### Cardholders must be able to review their own up-to-the-minute account information through the web interface, app, or from any administrative workstation using their ID card.

## (M) Components of the Production System

The components of the production system must:

### Include industry-standard components.

### Support a single multi-tech card (magstripe, barcode & contactless).

### Support Windows, iOS, and Android devices.

### Support entries of cardholder information and digitized images.

### System can expand to accommodate as many cardholders as necessary.

### Software comes with complete detailed documentation.

### Software comes with extensive unlimited online help.

### Support multiple user security levels.

### High energy ABA Track II & chip encoding is accomplished automatically during the card production process.

### Support a direct interface to the campus card system.

### Include recognized (non-proprietary) industry-standard hardware.

### Include recognized (non-proprietary) industry-standard software.

### Support the production of contactless technology.

### Include scheduled backup of open database.

### Include an electronic copy of all hardware and software manuals.

### Include new equipment only, used or refurbished must not be accepted.

### Include phone support/help twenty-four (24) hours a day seven (7) days a week three hundred and sixty-five (365) days a year (24/7/365).

### Include remote administration services.

## (ME) Event & Activity Management Terminal(s)

The terminal(s) must:

### Use industry-standard non-proprietary equipment which is compact and light for easy relocation, or is accessible through a web-based application or mobile application.

### Have highly visible multiple line displays capable of clearly indicating the result of an attempted transaction and alerting the operator of an off-line condition or other special event.

### Support direct TCP/IP communications without additional wiring or communications device.

### Provide privilege verification in activity locations (LC State must be able to assign a default activity to individual card readers so that only a card swipe/tap is required).

### Upon operator inquiry, display cardholder’s account/event plan number, card status, activity group, date card was last used, and balances in multiple accounts.

### Allow operators to report lost cards from the card reader to the system host.

### Allow managers to define authorized operators so that no transactions can be run unless an authorized operator has signed in.

### In the event that communications with the host are lost, the card reader must be able to automatically log transactions in an off-line state. It must be able to upload logged transaction information to the host when communications are restored.

### Provide error messages and diagnostic routines to help system operators troubleshoot problems with or without the assistance of supplier technical support.

### Be user programmable from the host, or another card reader, as well as using its own keypad.

### Restrict functions to authorized operators and management.

### **(E)** Provide levels of access capable of separating door operation administration from other functional access is desired but not required.

## (ME) Equipment Inventory System

### Must provide a method to track and maintain a list of inventory items available for cardholder checkout.

### Must perform equipment checkout from any user workstation, web client, or attended card reader.

### Must support standard equipment reporting through the user interface without requiring additional supplier-required programming.

### Must have the ability to report which items are checked-out by which patron and when they were checked- out.

### Must have the ability to charge for checked-out item.

### **(E)** Access Control options for door access and integrations with video surveillance either within the product or through other integrations is desired but not mandatory.

## (ME) Attendance Tracking

### Must have attendance tracking for events and meetings - both permanent, wired devices and portable/handheld units.

### The system must easily provide a log of attendees with date/time stamps.

### Must have data available for daily upload to Colleague.

### **(E)** Classroom attendance is desired but not mandatory. LC State is interested in wired and wireless devices located inside classrooms as well as portable/handheld units.

## (ME) ID Service Counter

### Terminals must allow for balance check and deposits to primary stored value account.

### Must have point of sale terminal for sales or replacement cards and ID-related items.

### Tenders accepted must include cash, check and credit/debit cards.

### Must provide sales reports and audit logs.

### Describe the proposed terminals in detail, including specifications, features and physical dimensions. Provide details on how the solution will accomplish balance checks, deposits, sales/replacement cards, reports and audit logs, as listed above.

## (ME) Meal Authorization

### Terminals/machines/readers to validate and deduct meals from unlimited or block-controlled meal plans.

### Responders must present in detail how your system accommodates meal plans including:

#### All you care to eat;

#### Meals per week offerings;

#### (E) Meal equivalence deduction in food service locations is desired but not required.

### Allow for primary stored value account to be used to pay for purchases for goods and services (i.e. beverage and snack vending machines), and be compatible with vending readers that accept both our stored value account and debit/credit cards for payment.

### Provide details demonstrating how the solution provides each of the requirements above. Explain how they are configured and programmed, how devices at the locations verify and deduct meals used, and examples of reports available. Present all mobile ordering options available. Please include how students and staff can access their meal and account balances and activity via the web and mobile app.

### **(E)** Available with credential present and biometric options is desired but not mandatory.

## (ME) Equipment

Offeror must provide the following equipment, with industry standard warranty for repair and replacement of equipment of 36 months, and list cost for extended warranty after initial warranty expires:

### Commercial grade ID card printer;

#### Warranty must include advanced replacement ;

#### One (1) year supply of printer ribbons and cards for printing;

#### Information and cost estimate on ribbon suppliers/costs per card;

#### Information on warrantee and service plans;

### One (1) Commercial grade id card software

#### Including customer support plan.

### One (1) compatible 1080p minimum resolution web camera.

### Thirty-five (35) Industry standard, OOTB Terminals/card readers (reader must be compatible with iPad, laptop, mobile devices, etc.):

#### Four (4) swipe readers for card holders with meal plans or campus/student loaded funds for POS food service/vending/tender locations;

#### Two (2) swipe readers for the information desk that also have POS functionality;

#### Four (4) swipe readers for print release stations;

#### One (1) swipe reader for fitness center;

#### Three (3) swipe readers for athletic events (mobile);

#### Two (2) swipe readers for entertainment events (mobile);

#### Six (6) swipe readers tutoring labs;

#### One (1) swipe reader Food Pantry;

#### Four (4) swipe reader for library;

#### Two (2) swipe readers off campus community partners (aquatic center and Bryden Canyon Golf);

#### Four (4) extra swipe readers if more off campus partners are added, other mobile events, or replacements (mobile);

#### Two (2) swipe readers that also have POS functionality.

### One (1) Campus card database system.

### Provide information on customer support plan. Provide information on warranty, service plans, estimated consumables cost. Provide information on fixed and mobile reader solutions for settings listed above. Provide details demonstrating how the solution provides each of the components above.

## (ME) Card and Production

Must provide a solution for:

### Physical Card production (printer, camera, software, card system support)

### Virtual access devices (allows for mobile credentials vi IOS and Android devices)

### Capability for end-user upload of ID image.

### Provide details on how the solution will provide for physical card production, virtual access on mobile devices, and ability of end users to upload ID image.

## (ME) Point of Sale (POS) Value Added Resellers (VAR)

### Point of Sale System that must be an Off-The-Shelf (OTS) or Out-of-the-Box (OOTB) solution, currently in use at Higher Education Institutions.

### Payment Acceptance features must:

#### Accept the One-Card provided through the RFP;

#### Accept credit cards - Accept Visa, Mastercard, Discover, American Express, and rewards cards—all at the same rate;

#### Apple Pay and Google Pay anywhere;

#### Accept Cash;

#### Use contactless, tap to pay for cards and mobile devices;

#### Not include inactivity fees;

#### Not include monthly fees when no transactions occur;

#### Process refunds;

#### Accept coupons, rebate codes and gift cards

#### Custom or itemized refunds for payments directly from your POS system or through the online portal/dashboard.

### Payment protection features must:

#### Allow disputes to be entered through an online portal/dashboard and are tracked;

#### Systems must monitor payments for suspicious transactions and provide electronic alerts to email or SMS when fraud is suspected;

#### All information entered must be encrypted and submitted to the payment servers securely. The system must meet Level 1 PCI Data Security Standards.

#### POS must comply with the Payment Card Industry Data Security Standard (PCI DSS).

#### Provide Multi-Factor Authentication support for assigned users;

#### Set up MFA verification with the use of the POS system to add a second layer of security.

### Checkout capabilities must include:

#### Item modifiers: Customize items with add-ons and special requests. Modifiers applied to items will display on receipts.

#### Customizable item grid: Allow admin users to configure the display to provide quick access to frequently used items.

#### Categories: Group items together in categories to help organize the item library and fine-tune reports.

#### Integrated hardware: Registers without built-in payment readers must wirelessly connect the Terminal to any device running the POS payment reader including a smartphone, iPad, or Android tablet.

#### Itemized refunds: Refund specific items from a transaction. The amount being refunded will reflect any applicable taxes and discounts for the selected item(s).

### Transaction and customer service features must include:

#### Offline Mode: Accept swiped card payments when the internet service is temporarily unavailable. Offline payments are processed automatically when the device regains connectivity, and will not expire if unprocessed within 72 hours.

#### Receipts: Provide customers with digital (text message or email) and printed receipts. Receipts reflect an itemized breakdown of quantities, discounts, and applicable taxes.

#### Custom tender: Ability to customize the checkout screen to best fit the business being conducted by toggling on or off payment types and reordering what payment types are available at checkout.

#### **(E)** Split tender: Customers can split a bill or use multiple forms of tender to complete payment. For each form of tender accepted, a separate detailed receipt will be issued. Desired but not mandatory.

#### Decimal quantities: Compatible with any specified unit of measure.

#### **(E)** Automatic discounts: Create automatic discounts for specific items, categories, quantities, daily specials, or limited-time offers. Desired but not mandatory

#### Customer Directory: A contact management tool for storing customer information.

#### Order notes: Ability to add notes to items or custom amounts at the time of sale to minimize future questions or disputes.

#### Feedback: Customers can provide feedback through digital receipts in their email.

#### Customized receipts: Ability to adjust the appearance of receipts.

### List all POS systems that your company supports as part of your card system, along with any integration licensing costs (initial and ongoing license costs).

### Explain what your company offers if an accredited VAR for the proposed manufacturer or how your company supports other POS systems.

### Elaborate on features your company adds to proposed, existing, or other brand hardware for a transaction processing system.

### Explain how your company employs technicians specializing in proposed, existing, or other brand POS terminal hardware.

### Explain how your company employs technicians specializing in the proposed, existing, or other brand POS terminal software’s.

### Explain how your company’s help desk is connected to the POS manufacturer’s help desk so that your company can dispatch hardware-related cases directly to the manufacturer on behalf of the client.

### Provide a listing of all colleges/universities where your company has successfully performed installations within the last 5 years with the proposed POS hardware.

## (ME) Additional System Applications

The solution must:

### Integrate with College student information system (Ellucian Colleague) in Real-time.

### Support online photo submission.

### Support ability for 3rd party to add funds to cards through online self-service.

### Support complete functionality of Ellucian mobile application.

### Integrate with library circulation system (i.e. Alma).

### Integrate with College student information system (Ellucian Colleague) with Ellucian Ethos or using a batch upload.

### Integrate with industry standard, OOTB POS systems and supports mobile ordering.

### Integrate with third party systems for performance/event ticket purchasing.

### Provide a solution for Recreation Centers on and off campus.

### Provide logging of liability release waivers resulting in activity access.

### Fully support mobile readers.

## (E) Desired Features and Functionality (not mandatory)

### (E) Door Access Control

#### Allow door access via the presented credential. System requirements:

#### Allow for programming of flexible unlocked time zones and the ability for easy immediate lockdown.

### (E) Self Service Card Value Center/Kiosk

#### Supplier supplied machine allows cardholders the ability to deposit cash or credit/debit deposits onto the campus ID card.

#### The machine supports an optional card-dispensing functionality for visitors.

#### Machine operates twenty-four (24) hours a day, seven (7) days a week.

## (ME) Installation

The Service Provider must remotely install the Campus Card System (the Solution) for Ellucian Colleague against a test environment at a site specified by Licensee before the on-site customizable training session. As part of the training session, the provider must work with Licensee technical staff to jointly configure the solution for Colleague. LC State requires a test environment, a development environment, and a production environment. The provider consultants must work with Licensee to make sure staff has the skills necessary to install and configure the Solution for Ellucian Colleague against the additional environments.

### Detail experience in achieving the above and provide a project plan and timeline.

## (ME) Training

Prior to delivering the training, the provider must work with the College to identify the appropriate stakeholders and team members for training. These stakeholders typically include staff from the institution’s IT and functional administrative departments, or those staff members identified as part of the product implementation or reporting team. All training must be provided on-site or a mutually agreed upon alternative. The College requests training for these select groups in a "train the trainer" model as to provide a transfer of knowledge beyond implementation. Sample training agendas are provided below.

### **(ME) Administrative/Technical Training**

#### System administrators must receive configuration and security training, designed to provide product administrators with an understanding of how they must approach installation, configuration, setting up users’ security set-up, data connections and troubleshooting.

#### The training must be available at no cost to Licensee.

### **(ME) Functional Training**

#### Functional training, including unlimited online and interactive live training, webinars, downloadable recorded training, written and downloadable documentation, context-based help, and on-site training.

#### Functional training is designed to provide functional area expertise in the product as it relates to their responsibilities and needs. This training covers basic use, product navigation, and tips and tricks. The training can be customized to specific audience and needs.

### **(M) Ongoing Training**

#### Additional training must be available at no additional cost.

### **(ME)** Detail experience in providing the above and provide a training plan and timeline.

## (ME) Support

### Support must include the provision of telephone technical support (including but not limited to troubleshooting of system issues, identification of system and data errors, support level escalation) preferred hours from 7:00 a.m. Pacific Time to 7:00 p.m. Pacific Time, Monday through Friday excluding holidays.

### Identify what technical support for all system issues will be provided, with defined severity levels and time to address and time to resolve for each severity level.

### Provide escalation path in case issues require manual escalation.

## (ME) Additional Technology Requirements

### Must be able to accept data from Ellucian Colleague through API, with preference given to direct integration using Ellucian Ethos.

### Must provide upgrades to software during length of contract to keep LC on most current supported software version.

### Complete **Data Security Requirements /PCI Compliance, Attachment 5** and submit with your proposal.

### Describe what proposed options are available in the event of a system outage.

## (ME) Implementation

### The system must be live and ready for use by March 1st 2024.

###  A detailed timeline for implementing your solution is required. Implementation to begin approximately November 1st 2023. Describe institutional and vendor roles and responsibilities and time commitments recommended for data transfer and training. Provide a projected timeline or calendar identifying milestones and deliverables.

### Describe your post-implementation customer support model including any priority system to provide for urgent support, hours of operation, location of support services, methods of support (ticket, phone, chat, etc.) and any planned changes to this model.

### Upgrades (system functions and features), updates, and enhancements must be included in the annual support fee, and offeror must detail its protocol for seamlessly rolling out upgrades, updates, and enhancements into the existing system after extensive internal quality assurance testing.

### Provide a transition plan that identifies each step in the process to transition from current state to new platform.

## (E) RISKS AND CONSTRAINTS

Based on the Scope of Work detailed in this RFP, identify any risks or constraints that you will need to address prior to or during the performance of the Contract; as well as a description of how you will address each one. In addition, please identify the following:

### What challenges you anticipate in providing the services identified in this RFP.

### How you will manage those challenges.

### What assistance you will require, if any, from LC State.

# **Cost Proposal**

**(ME)** **Cost Proposal:** Use Attachment 4 to respond to the Cost Proposal of this RFP. Do not alter the format of the attachment. Doing so may cause your proposal to be found nonresponsive. Offerors must provide fully-burdened rates which must include, but not be limited to, travel costs, administrative costs, and all other work that will be required to meet the scope of work in this RFP.

# **Proposal Review, Evaluation, and Award**

## Overview

The objective of LC State in soliciting and evaluating Proposals is to ensure the selection of a firm or individual that will produce the best possible results for the funds expended.

### All Proposals will be reviewed first to ensure that they meet the Mandatory Submission Requirements of the RFP as addressed in Sections noted with an (M). Any Proposal(s) not meeting the Mandatory Submission Requirements will be found non-responsive.

* 1. **Technical Proposal**
		1. The Technical Proposal will be reviewed first on a “pass” or “fail” basis to determine compliance with those requirements listed in the RFP with an (M) or (ME). All Proposals which are determined by LC State, in its sole discretion, to be responsive in this regard will continue in the evaluation process outlined in this Section.
		2. The Technical Proposals that pass will be evaluated and scored by a Proposal Evaluation Committee.
		3. The criteria described in the Evaluation Criteria section will be used to evaluate and score the Proposals for the purpose of ranking them in relative position based on how fully each Proposal meets the requirements of this RFP. Particular emphasis will be placed on the Offeror’s understanding of the RFP, quality of product/service, and the description of how the activities will be performed.
		4. The scores for the will be normalized as a whole, or by category, at LC State’s sole discretion. Except cost, the Proposal with the highest raw score will receive all available points in total or by category total. Other Proposals will be assigned a portion of the maximum available points, using the formula:

(Raw score of Proposal being evaluated / highest raw score) x total possible points.

* 1. **Demonstration**
		1. LC State may invite several top scoring Offerors to provide a Demonstration. These Offerors may be asked to make Demonstrations to show the evaluation committee how their proposal meets the requirements in this RFP. All expenses associated with this part of the evaluation are the responsibility of the Offeror.
		2. Demonstrations will be evaluated and scored by a Proposal Evaluation Committee. LC State may request multiple Demonstrations if further clarification is needed. The demonstration becomes an official part of the response. LC State will utilize “Evaluated” and/or “Pass/Fail” demonstrations, as described below.
			1. **(E)** Evaluated Demonstrations - At the discretion of the college, several of the highest-scoring Offerors may be contacted to give an overview/Demonstration of their service and respond to questions. (Evaluation of the Demonstrations may result in adjustment of points awarded in the Business and Scope of Work Proposals, as the evaluation committee deems appropriate.) Failure to successfully demonstrate functions of the service listed as mandatory in this RFP may result in rejection of the proposal. LC State may request multiple demonstrations from the several top scoring Offerors.
			2. **(E)** Pass/Fail Demonstration - Alternatively, the college reserves the right to require an overview/Demonstration of only the top-scoring Offeror. If this option is chosen, the evaluation is strictly Pass/Fail for the apparent successful Offeror. If the apparent successful Offeror fails, then the next highest-scoring Offeror will be considered the apparent successful Offeror and the Demonstration process may be repeated.
			3. For those Proposals meeting mandatory requirements and making it to the Demonstrations, the total evaluation points will be summed with the cost points and Demonstration points, and the Proposals will be ranked by final total score.
		3. Pricing will be evaluated using a cost model that offers LC State the best possible value over the initial term of the Contract. Cost evaluation will be figured by applying the Offeror supplied costs from the Cost Proposal Attachment 4 to LC State’s estimated usage, as applicable. Award will be to the responsive, responsible Offeror whose Proposal receives the highest number of points in the respective category.
		4. The scores for the Cost Proposal will be normalized as follows: The Proposal with the lowest overall total cost proposed will receive all the cost points as assigned in the Evaluation Criteria below. Other Proposals will be assigned a portion of the maximum score using the formula:

Lowest Cost / Other Proposal cost x total possible cost points.

* 1. **Evaluation Criteria**

Step 1: Technical Proposal

Mandatory Submission Requirements Pass/Fail

Business Information (Section 6) 200 points

Organization and Staffing (Section 7) 100 points

Scope of Work (Section 8) 700 points

**Step 1 Total 1000 points**

Step 2: Presentation/Demonstration 300 points

**Step 2 Total 300 points**

Step 3: Cost Proposal (Section 9) 200 points

**Grand Total Points** **1500 points**

* 1. **General**
		1. LC State reserves the right to conduct interviews with all or some of the Offerors at any point during the evaluation process; however, the college may determine that interviews are not necessary. In the event interviews are conducted, information provided during the interview process shall be taken into consideration when evaluating the stated criteria.
		2. The college reserves the right to accept or reject any or all proposals, waive any informalities or minor technical inconsistencies, or delete any item-requirement(s) from this RFP or resulting Contract when deemed to be in the college's best interest. Representations made within the proposal will be binding on responding Offerors. The college will not be bound to act by any previous communication or proposal submitted by the Offerors other than this RFP.
		3. Negotiations with Select Offerors - at LC State’s sole option and discretion, the college may discuss and negotiate all elements of the proposals submitted by one or more selected Offerors whose proposals are within a competitive range determined by the college.
	2. **Responsibility**
		1. Pursuant to IDAPA 38.05.01.081, the RFP Lead may, in LC State’s sole discretion require the apparent high point Offeror to provide documentation to demonstrate its responsibility. The RFP Lead may request documentation including, but not limited to, credit or financial reports, and references. Failure to provide requested documentation may result in the Offeror being deemed non-responsible. Nothing herein shall prevent LC State from using other means to determine Offeror’s responsibility.
	3. **Revision of Proposals**
		1. After submission of a proposal but before the final selection of the successful proposal is made, LC State may select one or more Offerors to revise their respective proposals in order to obtain the best and final offers of such proposal.
		2. In the event, representations made by an Offeror in its revised proposal, including price, scope and consideration quotes, will be binding on the Offeror.
		3. LC State will provide each selected Offeror within the competitive range an equal opportunity for discussion and revision of its proposal.
	4. **Determination of Successful Offeror**
		1. LC State may make the selection of the successful proposal based on the proposals initially submitted, without discussion, clarification or modification. In the alternative, college may make the selection of the successful proposal based on negotiation with any of the Offerors.
		2. LC State is not obligated to select the Offeror offering the most attractive economic terms if that Offeror's proposal is not the most advantageous to the college overall, as determined by the college.
		3. LC State will maintain in its files concerning this RFP, a written record of the basis upon which a selection, if any, is made by the college.
	5. **Award**

LC State will award a contract(s) to the high point responsive responsible offeror(s), or whatever is in the best interest of the college.

* + 1. LC State makes no warranty or guarantee that an award will be made as a result of this RFP.
		2. The Offeror(s) deemed to be fully qualified and best suited among those submitting written proposals and/or presentations/demonstrations will be identified based on the evaluation factors stated throughout the response instructions and specification sections. Negotiations may be conducted with any or all Offerors. After negotiations are completed with Offerors, LC State shall select and notify the Offeror(s) which has, in LC State’s opinion, made the best proposal, and award the contract to take effect on the dates negotiated with Offeror(s). LC State reserves the right to judgment concerning quality of service and the Offeror's capability to service the agreement.
		3. Affiliated Institution - Any State of Idaho public higher education institution ("Affiliated Institution") may elect to utilize the Award from this RFP to purchase goods or services from the Awarded Offeror. In the event of such election, the Affiliated Institution agrees to be bound by the terms of this Contract as if it were an original party hereto.
		4. LC State will use commercially reasonable efforts to avoid public disclosure of the contents of a proposal prior to selection of the Offeror.
	1. **Rejection of Proposals**

LC State reserves the right to (i) enter into an Agreement for all or any portion of the requirements and specifications set forth in this RFP; (ii) reject any and all proposals and re-solicit proposals; or (iii) reject any and all proposals and temporarily or permanently abandon this selection process, as the college deems to be in the best interests of the college.

# **ATTACHMENT 1 – OFFEROR QUESTIONS**

RFP23-0825

Campus Card Solution

**Instructions:**

DO NOT IDENTIFY OFFEROR’S NAME OR COMPANY’S NAME OR PRODUCT NAMES OF INTELLECTUAL PROPERTY IN RESPONSES.

ADD ROWS BY HITTING THE TAB KEY WHILE WITHIN THE TABLE AND WITHIN THE FINAL ROW.

The following instructions must be followed when submitting questions using the question format on the following page.

1. DO NOT CHANGE THE FORMAT OR FONT. Do not bold your questions or change the color of the font.
2. Enter the RFP section number that the question is for in the “RFP Section” field (column 2). If the question is a general question not related to a specific RFP section, enter “General” in column 2. If the question is in regards to a Term and Condition or a Special Term and Condition, state the clause number in column 2. If the question is in regard to an attachment, enter the attachment identifier (example “Attachment 1”) in the “RFP Section” (column 2), and the attachment page number in the “RFP page” field (column 3).
3. Do not enter text in the “Response” field (column 5).
4. Once completed, this form is to be e-mailed per the instructions in the RFP. The e-mail subject line should reference RFP number followed by “Questions.”

RFP23-0825

Campus Card Solution

| **Question** | **RFP Section** | **RFP Page** | **Question** | **Response** |
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# **ATTACHMENT 2 – MODIFICATION AND EXCEPTION FORM**

RFP23-0825

Campus Card Solution

**Instructions:** Complete this form and submit with your RFP submittal if you are proposing modifications or taking exception to any of the requirements, terms, or conditions included in the RFP, including any documents incorporated by reference (such as the Standard Contract Terms and Conditions.) See RFP **Section 2.4** for a full explanation of the process surrounding Offeror-proposed modifications and exceptions.

Offerors must specifically address any and all proposed modifications and exceptions. Blanket requests to negotiate requirements, terms, or conditions will not be considered. Offerors must provide an explanation as to why the requirement, term, or condition should be considered non-material. Offeror must also provide a reason for the proposed modification or alternative language, specifically addressing the issues itemized in RFP **Section 2.4.**

The determination of materiality will be made at LC State’s sole discretion. Non-material modifications or exceptions may be negotiated with the apparent successful Offeror, at the discretion of LC State, and as otherwise provided in RFP **Section 2.4.**

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| RFP Section | RFP Requirement, Term, or Condition | Reason Requirement, Term, or Condition Should be Considered Non-Material | Proposed Modification, Alternative, or Exception | Reason for Proposed Modification, Alternative, or Exception |
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# **ATTACHMENT 3 – COVER FORM**

RFP23-0825

Campus Card Solution

**(M) Attachment 3, Cover Form must be completed, signed, and submitted with your Proposal.** Failure to complete and submit this form may result in your Proposal being deemed non-responsive.

**Instructions:** The Proposal must include a signed copy of this cover form. Copy and paste this form onto your company letterhead, or include the following information: Offeror’s company name, mailing address, phone number, fax number, e-mail address, and name of Offeror’s authorized signer. The cover form must include the RFP Number and Title and must be signed by an individual authorized to commit the Offeror to the contents of the Proposal.

|  |  |
| --- | --- |
| **Requirement** | **Response** |
| Offeror’s corporate or other legal entity status | [ ]  Corporation [ ]  Limited Liability Corporation (LLC)[ ]  Limited Liability Partnership [ ] Sole Proprietorship [ ]  Other (specify) |
| Offeror’s Tax Identification Number | EIN: |
| Offeror’s DUNS Number | DUNS:  |
| Is Offeror a legal entity with the legal right to contract? | [ ]  Yes [ ]  No |
| Other than modifications/exceptions identified on Attachment 2, in compliance with Section 2.2of this RFP, does Offeror accept, and is Offeror willing to comply with, the requirements of this RFP and attachments, including but not limited to LC State’s Standard Terms and Conditions at <https://www.lcsc.edu/purchasing/vendors>.  | [ ]  Yes [ ]  No |
| Is Offeror in compliance with applicable equal employment regulations? | [ ]  Yes [ ]  No |
| Does Offeror affirm that it has not employed any company or person other than a bona fide employee working solely for the Offeror or a company regularly employed as its marketing agent, tosolicit or secure this contract, and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for the Offeror or a company regularly employed by the Offeror as its marketing agent, any fee, commission, percentage, brokerage fee, gifts or any other considerationcontingent upon or resulting from the award of this contract? | [ ]  Yes [ ]  No |
| Does Offeror understand and agree that for breach or violation of the above term, LC State has the right to annul the contract without liability or, in its discretion, to deduct from the offered price the amount of any such fee, commission, percentage, brokerage fee, gifts, or contingencies.  | [ ]  Yes [ ]  No |
| Firm(s) and/or staff responsible for writing the Proposal | Names: |
| Does Offeror affirm that it is not currently suspended, debarred, or otherwise excluded from federal or state procurement and non-procurement programs? Note: vendor information is available at <https://sam.gov>. | [ ]  Yes [ ]  No |
| Does the Offeror affirm that the proposal will be firm and binding for one hundred twenty (120) days from the proposal opening date and through the duration year one (1) of the contract?  | [ ]  Yes [ ]  No |
| Does Offeror warrant that it does not knowingly and willfully employ persons who cannot legally work in this country; and that Offeror takes steps to verify that it does not hire persons who have entered our nation illegally or cannot legally work in the United States; and that any misrepresentation in this regard or any employment of persons who have entered our nation illegally or cannot legally work in the United States constitutes a material breach and will be cause for the imposition of monetary penalties up to five percent (5%) of the Contract price, per violation, and/or termination of the Contract? | [ ]  Yes [ ]  No |

Signed By:

Printed Name:

Date:

# **ATTACHMENT 4 – COST PROPOSAL**

RFP23-0825

Campus Card Solution

**(ME) Attachment 4, Cost Proposal must be completed and submitted with your Proposal.** The Offeror must provide a fully burdened rate which must include, **but not be limited to**, all operating and personnel expenses, such as: overhead, salaries, administrative expenses, travel, profit, and supplies. LC State must not be liable to the Offeror for any expenses Offeror pays or incurs unless otherwise agreed to in writing by LC State. Except as set forth in the Agreement, the Offeror must supply, at its sole expense, all staffing, equipment, tools, materials, and supplies to accomplish the services to be performed pursuant to the Contract.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Cost Per Month** | **Quantity**  | **Unit of Measure** | **Fully burdened Cost** |
| Year 1 Service\* | $ | 12 | Month | $ |
| Year 2 Service | $ | 12 | Month | $ |
| Year 3 Service | $ | 12 | Month | $ |
| Year 4 Service | $ | 12 | Month | $ |
| Year 5 Service | $ | 12 | Month | $ |
| **TOTAL 5-YEAR COST** | **$** |

\*Year One Service must include implementation

Company Name: \_

Signed By:

Printed Name:

Date:

# **ATTACHMENT 5 – DATA SECURITY/PCI COMPLIANCE**

RFP23-0825

Campus Card Solution

**(ME) Attachment 5, Data Security/PCI Compliance must be completed and submitted with your Proposal, along with documentation specified in this attachment.**

|  |  |
| --- | --- |
| **Requirement** | **Response** |
| Will this product or service have involvement in creating, storing, processing, transmitting, or accessing LC State data or handling financial transactions? | [ ]  Yes [ ]  No |
| If yes, will any data be removed by, accessed from, copied to, or created within systems that do not reside within the geographical boundaries of LC State? | [ ]  Yes [ ]  No |
| If yes, provide a copy of any applicable audit or security assessment reports or certifications such as: SSAE 16, SOC 2, or ISO 27001 and include copies of any applicable corporate information security policies or other supporting documentation.  | Title of provided report(s) or certification(s): |
| If an NDA is required for the disbursement of any of these documents or information, provide a copy of the NDA in your response. Check Yes if NDA is required: | [ ]  Yes [ ]  No |
| Will this product or service have involvement in the processing of credit card transactions (Card-Present, Card- Not-Present, Online, Phone-based, or otherwise)? | [ ]  Yes [ ]  No |
| If yes, submit a QSA-signed Attestation of Compliance to the Payment Card Industry Data Security Standards (“PCI-DSS”). Confirm attestation is provided:  | [ ]  Yes [ ]  No |
| If yes, Offeror acknowledges and agrees to the following statements: |
| i. LC State requires that Offeror at all times maintain compliance with current PCI DSS as applicable. Accordingly, the Offeror will be required to provide confirmation of compliance upon request by LC State throughout the contract term. Respondent hereby acknowledges that cardholder data may only be used for execution of the contracted systems or services as described herein, or as required by the PCI DSS, or as required by applicable law. | [ ]  Yes [ ]  No |
| ii. If, during the contract term, offeror becomes aware that systems or services provided under the contract falls out of compliance with PCI DSS requirements, the offeror shall immediately notify the LC State Director of Information Technology.  | [ ]  Yes [ ]  No |
| iii. In the event of a breach, intrusion, or unauthorized access to cardholder data, offeror shall immediately notify the LC State Director of Information Technology to allow for the PCI DSS breach notification process to commence. Offeror shall provide appropriate payment card companies and their respective designee’s access to Offeror’s facilities and all pertinent records to conduct a review of Offeror’s compliance with the PCI DSS requirements. Offeror acknowledges liability for any and all costs resulting from such breach, intrusion, or unauthorized access to cardholder data deemed to be the fault of Offeror. Offeror agrees to assume responsibility for informing all such individuals in accordance with applicable law and to indemnify and hold harmless LC State and its officers and employees from and against any claims, damages, or other harm related to such breach. | [ ]  Yes [ ]  No |