



Procurement & Contracts
11000 University Parkway
Bldg. 20W, Room 159
Pensacola, FL 32514

**Request for Proposal
14RFP-08BP
Enrollment Affairs, One-Stop-Shop Customer Call Center**

April 14, 2015
TO: Potential Participants

The University of West Florida (hereinafter referred to as "UWF" or "University") located in Pensacola, Florida is soliciting responses to a Request for Proposal for an **Enrollment Affairs, One-Stop-Shop Customer Call Center**.

Carefully review this Request for Proposal, as it provides specific technical information necessary to aid participating firms in formulating a thorough response. **Should you elect to participate, complete an original and the required copies of the requested information and return proposal binders and the sealed price package all in a sealed box/envelope directly to Procurement & Contracts before 2:00 p.m. Central Time, May 6, 2015.** For more information refer to "RFP Information and Instructions" below. **Late or incomplete responses will not be accepted.**

Respondents are fully responsible for obtaining the complete RFP, Addenda (if applicable), and information concerning the RFP tabulations by visiting our web site:
<http://uwf.edu/procurement/pages/OpenBidsProposals.cfm>

In accordance with 119.071, Florida Statutes, submittals will only be acknowledged in the public solicitation closing, no submittals will be opened and no pricing will be announced. Submittals are exempt from public records laws until such time as the agency provides notice of an intended decision or 30 days after the closing. In compliance with the statutes, the University will not open submittals publicly but will retain a recording of the opening and will post the decision as soon as available.

Because purchases or contractual agreements of this nature require the expenditure of public funds and/or use of public facilities, all respondents shall understand that portions (potentially all) of their submittals as well as final contract and related documents will become public record upon contract award. After the posting of award, respondents may view solicitation files by contacting the Procurement & Contracts Facilitator.

Bob Pacenta, CPPB, FCCN, FCCM
Assistant Director
Phone: 850/474-2627
Fax: 850/474-2090
E-mail: rpacenta@uwf.edu

**UNIVERSITY OF WEST FLORIDA
PROCUREMENT AND CONTRACTS**

REQUEST FOR PROPOSAL # 14RFP-08BP
Enrollment Affairs, One-Stop-Shop Customer Call Center
RFP DUE DATE: May 6, 2015 2:00 p.m. CST

Section I

OVERVIEW

A. General Information and Summary –

Background:

The University of West Florida (UWF) is a public, fully accredited, co-education institution of the twelve-member State University System of Florida (SUSF). UWF is a regional, comprehensive university with its main campus located in Pensacola, Florida, with a branch located in Fort Walton Beach as well as a center at Eglin Air Force Base, and offices at Naval Air Station Pensacola, Whiting Field in Milton and Hurlburt Air Force Base in Mary Esther. The University currently enrolls more than 12,000 students.

From its founding in 1963, UWF has purposefully chosen to be different by design and maintains that intention today as one of Florida's 12 State University System (SUS) institutions. UWF has grown into a vibrant, distinctive institute of higher learning. UWF has successfully expanded its nationally recognized undergraduate, graduate and targeted research programs, including programs offered fully online. Dedicated to helping students realize their full potential, UWF favors small classes with fully qualified teacher-scholars who deliver personalized, innovative, hands-on learning and provide leadership opportunities.

In fact, many individual UWF programs and faculty members have achieved national prominence while the university itself has garnered additional recognition from Forbes Magazine, ranked as one of "America's Top Colleges," from The Princeton Review as one of the "Best Southeastern Colleges," from U.S. News and World Reports as one of the "Top Online Education Programs," from The Chronicle of Higher Education as one of the "Great Colleges to Work For" and from G.I. Jobs Magazine as a "Military Friendly School."

Located on the beautiful Gulf Coast of Florida, the UWF main campus is just minutes away from historic downtown Pensacola and some of the world's best beaches. In addition to the main campus, the university extends its services to various locations and offers a broad array of online programs. UWF also operates 29 historic properties in downtown Pensacola, through West Florida Historic Preservation, Inc. UWF Emerald Coast offers multiple locations close to home for residents located along the Emerald Coast, including Okaloosa and Walton counties.

For more information on UWF, please visit www.uwf.edu. For specific information on the institution's strategic plan for 2012-2017, visit <http://uwf.edu/president/strategicdirection.cfm>.

Project Description

In an effort to facilitate students' access to and choice of UWF to meet their higher education needs (UWF Strategic Priority 1.2, see <http://uwf.edu/president/strategicdirection.cfm>), UWF

intends to contract with a firm for services related to a comprehensive call center operation that supports a One-Stop-Shop model and focuses on enhancing customer service in the Office of Enrollment Affairs, which includes Admissions, Financial Aid, Financial Services and Office of the Registrar.

UWF is also looking for the vendor to potentially support chat, e-mail, voice recorded messages, and to provide education and instructional videos targeted at the above-referenced offices in an attempt to better educate students and also reduce the number of inquiries in the above mentioned areas.

B. Timetable

The anticipated schedule and deadlines for this RFP and contract approval are projected as follows:

Activity	Time (Central)	Date
Issue RFP		April 14, 2015
Written request for explanation deadline date	2:00 P.M.	April 24, 2015
RFP Due Date	2:00 P.M.	May 6, 2015
Estimated Notice of Intent to Award		May 15, 2015
Estimated Contract Begins		June 1, 2015

C. Contact Person

The Procurement & Contracts Facilitator and sole contact for this RFP is:

Bob Pacenta, Assistant Director

Email: rpacenta@uwf.edu, Phone: 850-474-2627, Fax: 850-474-2090

Web address: <http://uwf.edu/procurement>

Respondents are advised that from the date of release of this RFP until award of the contract, no contact with University personnel related to this RFP is permitted. All communications are to be directed to the Procurement & Contracts Facilitator listed above. Any such unauthorized contact will result in the disqualification of the Respondent’s submittal.

Respondents are fully responsible for obtaining the complete RFP, Addenda (if applicable), and information concerning the RFP tabulations by visiting our web site: <http://uwf.edu/procurement/pages/OpenBidsProposals.cfm>. It is recommended that you bookmark this web site and visit it frequently.

Explanation(s) desired by respondent(s) regarding the meaning or interpretation of this RFP must be requested from the above contact person, by e-mail prior to the deadline date, as stated in above “B. Timetable”. The explanation response will be issued in the form of an Addendum and posted to our web site.

Any changes or clarifications to requirements resulting from a pre-proposal conference or subsequent written questions shall be issued by official addenda. Respondents should not rely on any representations, statements, or explanations other than those made in writing by the UWF

sole POC in the official addenda format. Where there appears to be a conflict between the RFP and any addenda issued, the last written addenda issued shall prevail.

D. Response Submission

Section 815.045, Florida Statutes makes trade secrets confidential and exempt from public records requests. Trade secrets, as defined in section 812.081 Florida Statutes include proprietary information which is (1) secret, (2) of value, (3) for use in your business or in use by your business and which is (4) of advantage to your business, or provides an opportunity for you to obtain an advantage over those who do not know the information or use the information. In order for the information to be considered covered by these statutes, you must take measures to prevent the information from becoming available to persons other than those selected by you to have access to the information.

Ordinarily, information contained in bid submissions is available to the public upon request. If you believe any of the information provided in your submission meets the criteria of a trade secret and you wish to protect it, you must write the word "confidential" on each page, either on the bottom, top or as a watermark BEFORE you provide the submission to UWF.

The required copies of the Response with the signed Affidavit form must be received by the University of West Florida Procurement & Contracts on the due date and time as stated in the above "B Timetable". See Section IV RFP Information and Instructions for more information.

Each response is to be submitted in a three ring binder using index tabs with the appropriate tab identification as requested within this RFP.

Submit:

- One (1) original, clearly marked as original and shall contain the original manual signature of the authorized person signing the proposal.
- Six (6) hard copies; and
- one (1) electronic copy of the original

Failure to include the original and all signed copies shall be grounds for rejection of your response without further evaluation.

- The outer carton of the response shall include the RFP number, RFP name, and due date.
- Your response shall include the information and required submittals described in the Content section, tabbed, and numbered with all information appearing in the Tab in which it was requested.
- All information and required submittals requested shall be in hard copy form and included in your written response. Responses shall not refer the university to electronic media such as websites, cd's, disks, or tapes in order to obtain the required information or submittals.
- Information submitted that is not requested by the university may be considered to be supplemental, and not subject to evaluation by the team members.
- If there is any information or required submittals which due to size or binding cannot be

incorporated following the proper tab, you must provide information following the numbered tab, telling the evaluator where the information can be found in your response.

- All required signed and completed copies of the response with the signed Affidavit Form must be either mailed or delivered to:

UNIVERSITY OF WEST FLORIDA
Procurement & Contracts
Bldg. 20W Room 159
11000 University Parkway
Pensacola, FL 32514

- **CAUTION: The executed Affidavit Form (Attachment “A”) must be signed and submitted as part of your response. Failure to do so will disqualify your response.**

- **All addenda shall be signed and submitted as part of your response.**

E. RFP Information and General Conditions
See Attachment B

F. Sample Agreement
See Attachment C

G. Appendix I Minimum Insurance Requirements
See Attachment D

Section II

SCOPE OF SERVICES

A. Scope of Services

UWF desires the most thoroughly developed and highest quality professional call center services available. The following specifications outline the minimum firm requirements for the proposed service. They are provided to assist participants in understanding the objectives of UWF and submitting a thorough response. Responses to this RFP received must reflect in detail their inclusion and the degree to which provided

The successful vendor will receive calls from UWF’s telephone lines. Estimated annual call volume is between 150,000 and 200,000. In addition, the Vendor maybe asked to support the development of voice-recorded messages, e-mail and Chat support. Calls received from UWF’s telephone lines and from the dedicated phone line will be answered during UWF Enrollment Affairs’ standard business hours, which are currently between 8 am and 5 pm Central Time, Monday thru Friday. Other mutually agreed-upon times may be requested by UWF.

The Vendor’s representatives will be required and trained to respond to the following types of inquiries:

- General and detailed information related to admissions, financial aid, student billing and registration processes.
- Requests for information and materials (actual materials fulfillment will be provided by UWF).

- Specific requests related to the student's application status, including both admissions and financial aid application processes.
- Financial Aid status questions, including anticipated disbursement dates and dates funds are credited to student's account.
- Payment and billing information.
- Refund questions.
- Understanding and resolving Registration Holds.

Case notes will be logged by the Vendor in UWF's student information system(s) or a similar system, as appropriate. Preference will be given to vendors with "demonstrated" experience with the Ellucian Banner student information system.

The Vendor will refer the caller to UWF's appropriate department for questions regarding other university business, such as, a student's admission status, etc. In cases where the Vendor's representative is unable to provide the information requested by the caller, the caller will be referred to the appropriate UWF office.

The Vendor will provide biweekly and monthly reports with information on the number of calls or e-mails answered during each period and such other pertinent information, as requested by UWF, which may include such data as abandonment rates, average seconds to answer calls, calls referred back to customer and reason for call/call subject. The Vendor will provide information related to identified process that can be enhanced. Vendor will also participate in weekly or periodic conference calls with UWF to discuss current issues and plans.

The Vendor will provide a Knowledgebase tool that can be accessed and updated by UWF staff.

The Vendor will provide a summary of its employee training program, including FERPA.

The Vendor will assume training responsibility of their staff, with assistance from UWF, as needed. All training materials will be updated annually, and jointly shared with UWF and the Vendor.

UWF is prepared to provide the following support to the Vendor. As in the previous section, provide a detailed commentary for each support service offered along with the acknowledgement and acceptance of the proposed support. In addition, provide an explanation for any additional support required to provide the level of service requested.

UWF will designate a person from the One Stop Shop to receive daily communication and provide Vendor with information necessary or helpful to respond to callers' inquiries.

UWF will assist the Vendor with initial training information and assist the Vendor with the development of scripting prior to the start date of the services.

UWF will provide the Vendor with copies of all pertinent business process and related correspondence to assist with training and answering questions from callers.

UWF will respond directly to callers who have questions that cannot be answered by the Vendor's representatives.

UWF will provide the Vendor with the proper names, functional responsibilities and telephone numbers of departments to whom to refer inquiries about Admissions, Housing, Student accounts, Registration, Financial Aid and miscellaneous inquiries.

Section III

SPECIAL TERMS AND CONDITIONS

A. Term of Contract

The proposal is to cover an initial period of three (3) years with an option of a renewal services for two (2) additional years. UWF and the provider will agree upon renewals in writing.

B. Insurance

The respondent shall include written evidence of the appropriate insurance coverage with the proposal. During the term of the contract, the successful Respondent must provide, pay for and maintain insurance in accordance with Insurance Attachment D – Minimum Insurance Requirement.

Upon notification of intent of award to the successful Respondent, an original ACORD certificate of insurance for the coverage described above must be received by UWF Procurement and Contracts with the appropriate identification for the “holder and additional insured” as specified in the Minimum Insurance Requirements.

C. Florida’s Public Records Law

Respondent shall comply with Florida's Public Records Law. Specifically, Respondent agrees that it will:

- A. Keep and maintain public records that ordinarily and necessarily would be required by UWF in order to perform the services performed by Consultant under the Agreement.
- B. Provide the public with access to such public records on the same terms and conditions that UWF would provide the records and at a cost that does not exceed that provided in chapter 119, Fla. Stat., or as otherwise provided by law.
- C. Ensure that public records that are exempt or that are confidential and exempt from public record requirements are not disclosed except as authorized by law.
- D. Meet all requirements for retaining public records and transfer to UWF, at no cost, all public records in possession of Consultant upon termination of the Agreement and destroy any duplicate public records that are exempt or confidential and exempt. All records stored electronically must be provided to UWF in a format that is compatible with the information technology systems of UWF.
- E. The failure of Consultant to comply with the provisions set forth shall constitute a default and breach.

Section IV

RFP INFORMATION AND INSTRUCTIONS

A. RFP Information

- Proposals must be made in the official name of the firm or individual under which business is conducted and must be signed by a person duly authorized to legally bind the person, partnership, company or corporation submitting the proposal. The submittal of a proposal by a Respondent will be considered by UWF as constituting an offer by the Respondent to provide the services for UWF at the rates bid herein.
- Respondents shall be of known reputation and shall have sufficient experienced and qualified personnel to adequately perform the prescribed service.
- By submitting a proposal, the Respondent agrees to be governed by the terms and conditions as set forth in this document to include all attachments. Any proposal containing variations from terms and conditions set forth herein may, at the sole discretion of the University, render such proposal unresponsive.
- All provisions of this Request for Proposal and the successful Respondent's proposal, as mutually agreed upon by subsequent negotiation, provide the specifications for, and obligations of both parties to be executed by any duly authorized representative(s). The following shall constitute the contract agreement.
 - UWF RFP document
 - All addenda issued pursuant thereto
 - Contractor's proposal
 - UWF Consultant Contract to include all clarifications & negotiated modifications to Consultant's proposal

B. Submittal Instructions

Respondents shall format their responses utilizing the following Tab, Topics, Lettering, and Numbering system with requested information contained in each. Failure to comply may result in a negative review of your response and may place your response in jeopardy. Each copy is to be submitted in a three ring binder using index tabs with the appropriate tab identification.

Tab A Essential Documents

- Signed Affidavit, Attachment A
- Signed Addenda (if any)

Tab B Executive Overview

- Disclose general information about your company including a brief history and information regarding amount and type of experience of the company.
- Provide a description of the standard services offered by the company and its ability to provide consulting services as outlined in this solicitation.
- Provide a listing of professional organizations of which the firm is a member.

- Disclose if the company has ever declared bankruptcy. If yes, attach a statement indicating the bankruptcy date, court jurisdiction, trustees' name, telephone number, amount of liabilities, amount of assets, and current status of the bankruptcy.
- Attach detailed information regarding any litigation or claims of more than \$5,000.

Tab C Personnel

Please provide detailed answers and documentation to the following questions in Tab C of the response, noting differing staff and/or approaches with graduate versus undergraduate marketing services:

- Breakdown your company's locations and headcounts: headquarter (HQ) location, number of employees at the HQ and the locations and counts of all satellites and employees. (Do not count contractors). Include location of the call center (if different), capacity, technology, experience, current client base.
- Please describe your company's account management organization. Please describe your company's call center staffing model.
- Provide names and resumes of those individuals who will constitute the vendor's team and who will provide program services for UWF. Identify team leader(s) and coordinator(s).

Tab D Service Description

- Describe briefly your experience in the successful operation of call centers supporting higher education, for the past three years; specifically for multiple services within a one-stop-shop. Please be specific to the services requested.
- Provide detailed information on required resources (human and technological) to effectively respond to anticipated annual call volume. Include training plan for agents, average length of service for agents, and evidence of your ability to deliver superior customer service, including quality assurance plans.
- Provide samples of reporting documentation and call volume history. How will the information be available to UWF: web-based, electronically or hard copy?
- Provide at least one detailed case study example of your work with a higher education client implementing call center services for a student services one-stop-shop. Include detailed information on design and implementation of the service; resources required for the service portfolio; volume of calls handled on a monthly and annual basis; integration of the service with on-campus personnel and departments; monitoring and quality assurance; and specific outcomes (success metrics, etc.).

Tab E Technical and Integration Capabilities Content Management System (CMS) Capabilities

UWF uses the Ellucian Banner student information system. UWF stores business process documentation in the Confluence wiki knowledgebase. UWF uses the JIRA platform for processing service tickets and service referrals.

Provide information on platforms used by your solution (e.g., CRM system, knowledgebase, etc.) and any required integrations with UWF systems.

Tab F Other Considerations

Provide description of other considerations firm will provide in support of the University's mission such as scholarships, internships, sponsorship of UWF activities, UWF promotional opportunities, etc.

Tab G References

- Provide references from at least three clients, preferably that use the Ellucian Banner Software, of three years or more, serving customers for whom similar services are currently being provided. Each reference should include the Company Name, Contact Name, Current Phone Number, and **E-mail address**.

Tab H Consultant Agreement

Review Attachment C for UWF's standard contract to be issued to the awarded Respondent. If applicable, list any objections to specific contract terms and provide requested replacement contract language. UWF reserves the right to accept or reject any suggested replacement contract language. Although subject to minor revisions to include all clarifications and negotiated modifications, the successful firm will be required to execute UWF's agreement.

Cost Proposal

Respondents are to submit the following information in one, separate, sealed envelope identified as "Cost Proposal" and with the firm's name and RFP 14RFP-08BP. Do not include in the 3-ring binders.

Estimated annual call volume is between 150,000 and 200,000. Respondents must supply a **lump sum total cost** for the entire project/engagement as proposed including any and all costs or expenses to complete.

Section V

EVALUATION, NEGOTIATION, AND CONTRACT AWARD

A. Evaluation Process

Each response will be reviewed by Procurement & Contracts to determine whether it is responsive to the submission requirements outlined in the RFP. A responsive RFP is one which has followed the requirements of the RFP, includes all documentation (including, but not limited to, the signed Affidavit Form), is submitted in the format outlined in the RFP, was submitted prior to the due date and time, does not exceed budget of and has the appropriate signatures as required on each document. Failure to comply with these requirements may put your response at risk of being rejected as "non-responsive".

Proposals fulfilling the basic submittal requirements shall be referred to an Evaluation Team for review and evaluation. Responses will be independently evaluated by Evaluation Team members on the basis of the written responses and additional written information as requested. The Evaluation Team will review the responses and assign a score to each category for each Respondent. The scoring by each member of the evaluation team will be aggregated to establish an overall ranking of every Respondent.

The Evaluation Team (Team) will rank each submittal utilizing the following criteria:

B. Evaluation Criteria and Weights

1.	Higher Education Academic Experience Portfolio	25 pts	Tab F/Tab G
2.	Documented Case Study Success & Relevance to UWF Project	25 pts	Tab D
3.	Proposed Service Capabilities & Qualifications/Experience of Staff	20 pts	Tab C
4.	Strategic Approach and Process Alignment with UWF Goals	10 pts	Sect IV/Tab B
5.	Technical and Integration Capability	10 pts	Tab E
6.	Cost Proposal	10 pts	

The Procurement & Contracts Facilitator will facilitate and record the scores and/or rank assigned by each evaluator and then an overall Team ranking will be established for each Respondent. Total scores will be used to break a tie in ranking.

All Respondents are hereby advised that UWF may determine that oral interviews, additional written information, internal staff analysis and presentations, outside consultants, and/or any other information may be requested at any time during the Evaluation process in order to assist with the selection of the Best Value Respondent(s). The Evaluation Team may determine as a result of additional information that the impact of this information is significant and shall be accorded as such and may be incorporated into the scoring and/or ranking as a revision of the same and at the discretion of the Team.

C. Negotiations and Contract Award

After the Evaluation Team has developed an overall ranking for each Respondent, the Team and appropriate senior level management shall determine which Respondent(s) potentially offer the Best Value for UWF.

UWF may immediately award or commence negotiations with the Respondent or Respondents selected in the process above. If a satisfactory contract agreement cannot be reached, the University reserves the right to make the determination to: award without negotiation, terminate the negotiations without attempting to negotiate with all responding companies, or may hold negotiations with multiple companies simultaneously until the Best and Final offers (BAFO) have been received and compared with the award recommendation going to the most advantageous BAFO. This process may continue until such time as UWF has determined the negotiations to be successful or a determination is made to stop and cancel the solicitation.

UWF reserves the right to reject any and all proposals or portions thereof. UWF reserves the right to withdraw this RFP or a portion of this RFP without making an award. The award recommendation will be made on a Best Value basis to the most advantageous “Best and Final Offer” presented.

UWF will not be required to select the lowest cost Respondent. UWF may award a contract on the basis of initial offers received, without discussion. Therefore, each initial offer should contain the Respondent’s best terms from a cost, price and technical standpoint. UWF reserves the right to award without negotiation if deemed in the best interest of the university.

Representatives of the respondent(s) selected to participate in negotiation(s) shall first be **required to submit written authorization from the company CEO or CFO attesting to the fact that the company’s lead negotiator is authorized to bind the company to the terms and conditions**

agreed to during negotiations and as contained in the offeror's best and final offer. Such authorization will be requested immediately after the ranking of the respondents, and the provision of such authorization will be a prerequisite to continuation in the RFP process. Company negotiators shall enter the negotiations prepared to speak on behalf of the company. The University reserves the right to immediately terminate negotiations with any company whose representatives are not empowered to, or who will not, make decisions during the negotiation session. Companies are reminded that UWF may elect not to solicit a best and final offer from any company whose representative(s) have been unable or unwilling to commit to decisions reached during the verbal negotiation process.

If UWF determines that a company awarded a contract based on this RFP does not honor all agreements reached during the negotiations, and as contained in the subsequent "Best and Final Offer", UWF reserves the right to immediately cancel the award, and to place the company on UWF's suspended vendor list. Time is of the essence and therefore UWF retains the right to cease negotiations with any/all firms that do not respond to negotiation issues on a timely basis. UWF may reject offers that are determined to not be reasonably supportable. UWF reserves the right to select, and subsequently recommend for award, the proposed equipment/service which best meets its required needs, quality levels, and budget constraints.