



University of  
West Florida

Procurement & Contracts  
11000 University Parkway  
Bldg. 20E  
Pensacola, FL 32514

**Request for Proposal  
#14RFPT-02AJ  
K-20 Career and Education Planning System**

*October 9, 2014*

TO: Potential Participants

The University of West Florida (hereinafter referred to as *UWF*) is soliciting responses to a Request for Proposal for *K-20 Career and Education Planning System* at the University of West Florida located in Pensacola, Florida.

Carefully review this Request for Proposal, 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, November 7, 2014.** 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.

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Angie C. Jones  
Director, Procurement and Contracts  
**Phone: 850/474-2628**  
**Fax: 850/474-2090**  
**E-mail: [ajones1@uwf.edu](mailto:ajones1@uwf.edu)**

**UNIVERSITY OF WEST FLORIDA  
PROCUREMENT AND CONTRACTS**

**REQUEST FOR PROPOSAL #14RFPT-02AJ**  
**K-20 Career and Education Planning System**  
**RFP DUE DATE: November 7, 2014 2:00 p.m. CST**

**Section I**

**OVERVIEW**

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**A. General Information and Summary –**

The University of West Florida is a public, fully accredited, co-education institution of the twelve-member State University System of Florida. The University 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 Field in Mary Esther.

The University currently enrolls more than 12,500 students in its College of Arts, Social Sciences, and Humanities, College of Business and College of Professional Studies. It is the University's goal to become the number one regional comprehensive university in America. We believe that education is a path to success and a vital contributor to the quality of life. We strive to provide an environment that nurtures integrity, quality, innovation, distinctiveness, stewardship, collaboration, inclusiveness, relevance and caring.

The University's website, <http://uwf.edu/>, provides additional information which may be useful to the Respondents.

The University is the lead for the Complete Florida Plus Program and Complete Florida Initiative for the state of Florida. The Complete Florida Initiative is a legislatively created program for adults who have stopped out of college, but are now interested in returning to complete their degrees. Through fully online, competency-based learning, accelerated courses and prior learning assessment, this program is tailored to workforce related degrees. Using a concierge-based approach to student services, Complete Florida will facilitate retention and degrees earned. Currently, Complete Florida is implemented through collaboration with 11 partners which included state colleges, state universities and private universities in Florida.

The University intends to contract with a company, which specializes in the delivery of a K-20 computer-assisted career and education planning system for use by public school systems, career and technical schools, colleges and universities for the state of Florida's K-20 students. These students include traditional populations plus non-traditional populations including active duty military, veterans, returning adults (e.g. those that have stopped out of college, over 25). In addition, the system will be open to all residents in the State of Florida. The purpose of the system is to provide age-appropriate career and education planning for the users and at the same time provide data and metrics for administrators and policy makers. This system will be part of the Complete Florida Plus Program. The system must be accessible and available to adults and students in education programs, elementary through post-secondary institutions, veterans and the military, career and technical center clients as well as residents in the State of Florida. The system will be updated as needed with data that includes Florida educational institutions and program offerings, the Florida Economic Security Report, job market projections, and specific occupational information.

This system is required in accordance with s.1000.03 (5) (g), 1003.4156 (1) (e), 1003.4285 (2), 1004.93 (8) and 1006.735 F.S. Ensuring that students, veterans and the military, and adult learners have access to a career and education planning system is a priority for the State through Complete Florida Plus. The tools and resources needed to engage and equip Floridians with knowledge of careers, occupations, and the workforce is essential. Better prepared and informed students and individuals ease the transitions within the educational institutions and programs and prepare them to enter the workforce. Respondents need to

review the statutes for specific details related to expectations of requirements. The successful program will either a) incorporate existing programming functionality and data sources, along with the new K-20 career guidance functionality, into the vendor’s existing platform, or b) use vendor-supplied Application Program Interface’s (API’s) and web services to integrate new K-20 career guidance functionality into the existing platform. Vendors may propose either solution or both.

**B. Timetable**

Unless otherwise revised by an Addendum to this competitive solicitation, the dates and times by which stated actions will be taken or completed are listed below. If UWF determines, in its sole discretion, that it is necessary to change any of these dates and times, it will issue an Addendum to this competitive solicitation which will be posted on the website. All times listed are Central Standard Time (CST).

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

Activity	Time (Central)	Date
RFP advertised and released		October 9, 2014
Last day for UWF to receive communications and/or inquiries from Vendors regarding this RFP.		October 16, 2014
UWF will respond to inquiries and requests for clarifications by posting an Addendum on the website.		October 20, 2014
Deadline for UWF to receive solicitation responses from Vendors and solicitation response opening.	<b>2:00 P.M.</b>	<b>November 7, 2014</b>
Notice of Shortlist		On or about November 18, 2014
Oral Presentations and System Demonstrations		Week of 12/1-5, 2014
Estimated Notice of Intent to Award		On or about December 8, 2014
Estimated Contract Begins		January 1, 2015

**C. Contact Person**

**The Procurement & Contracts Facilitator and sole point of contact (POC) for this RFP is:**

Angie C. Jones, Director, Procurement and Contracts  
 Email: [ajones1@uwf.edu](mailto:ajones1@uwf.edu), Phone: 850-474-2628, Fax: 850-474-2090  
 Web address: <http://uwf.edu/offices/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 may result in the disqualification of the Respondent’s submittal. Only those communications that are in writing from the POC shall be considered as duly authorized expressions on behalf of UWF.**

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/offices/procurement/vendors-only/open-solicitations/>. 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 (if applicable) 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. Unless the POC specifically requests Vendor to provide additional communications, UWF will not accept or consider any of the Vendor's written or other communications and/or inquiries (except solicitation response) received between the Inquiry deadline date and the posting of an award, if any, under this competitive solicitation.

#### **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 the University.

**The required copies of the Response with the signed Affidavit form must be received by the University of West Florida Office of 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. In addition, a copy of the response in Adobe PDF format shall be included in an electric format.**

Submit:

- One (1) original, clearly marked as original and shall contain the original manual signature of the authorized person signing the proposal.
- Nine (9) 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. Vendor's response must be typed or printed in permanent ink.
- 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

**H. Cost Proposal**

See Attachment E

**H. Florida Statutes Related to This Program**

The table below outlines Florida Statutes related to this program, and the related minimum required programmatic components of the contracted system and services. These minimum requirements are further elaborated in the *Scope of Services* section of this Request for Proposals.

	<b>K-20 programmatic components-- “Must” Items</b>	<b>Statutory Reference/Reasoning</b>
1	<p>The contracted party must provide a comprehensive career and education planning (internet-based) system that allows K- 20 students (elementary through postsecondary) to acquire the self-knowledge necessary to investigate the world of work and education and make informed career and education decisions.</p> <p>The system must include a national and Florida education and training information file for educational programs and educational institutions. The education and training options shall include, but are not limited to: state universities, colleges, school district career centers, professional schools, private proprietary schools, and private not-for-profit schools.</p> <p>The system must allow users to conduct an alphabetical search of financial aid (federal and state-specific) and scholarship awards by title.</p>	<p><u>1000.03, F.S. Function, mission, and goals of the Florida K-20 education system.</u>                      (5)(g) <i>Comprehensive K-20 career and education planning.</i> It is essential that Florida’s K-20 education system better prepare all students at every level for the transition from school to postsecondary education or work by providing information regarding:                      1. <u>Career opportunities, educational requirements associated with each career, educational institutions that prepare students to enter each career, and student financial aid available to pursue postsecondary instruction required to enter each career.</u>                      2. How to make informed decisions about the program of study that best addresses the students’ interests and abilities while preparing them to enter postsecondary education or the workforce.                      3. Recommended coursework and programs that prepare students for success in their areas of interest and ability. This information shall be provided to students and parents through websites, handbooks, manuals, or other regularly provided communications.</p> <p><u>1003.4156, F.S. General requirements for middle grades promotion.</u>                      1. (e) One course in career and education planning to be completed in 6th, 7th, or 8th grade. The course may be taught by any member of the instructional staff. At a minimum, the course must be <u>Internet-based</u>, easy to use, and customizable to each student and include research-based assessments to assist students in determining educational and career options and goals.</p> <p><u>1004.93, F.S. Adult general education.</u>                      (8) In order to accelerate the employment of adult education students, students entering adult general education programs after July 1, 2013, must complete the following action-steps-to-employment activities before the completion of the first term:                      (a) Identify employment opportunities using market-driven tools.                      (b) Create a personalized employment goal.                      (c) Conduct a personalized skill and knowledge inventory.                      (d) Compare the results of the personalized skill and knowledge inventory with the knowledge and skills needed to attain the personalized employment goal.</p>
2.	<p>The system must be integrated with an industry validated, research-based interest assessment with results that must link to</p>	<p><u>1003.4156, F.S. General requirements for middle grades promotion.</u>                      1. (e) One course in career and education planning to be</p>

	<p>occupations and must have the ability for users to identify their personal work values and match them to career options.</p>	<p>completed in 6th, 7th, or 8th grade. The course may be taught by any member of the instructional staff. At a minimum, the course must be Internet-based, easy to use, and customizable to each student and include <u>research-based</u> assessments to assist students in determining educational and career options and goals.</p>
<p>3.</p>	<p>The system must include a feature designed for middle grade students to create a personalized high school course plan, based on their projected high school course offerings.</p> <p>The system must permit high school students to edit their personalized high school course plan that was created while in the middle grades or create a new one for their use.</p> <p>The system must allow students to determine high school course progress in relation to satisfaction of minimum high school graduation requirements and in achieving personal goals of entering state university system, state college system, state scholarship programs, etc.</p> <p>The system must have the ability for parents to track their child’s progress towards each standard high school diploma designation (scholar and/or merit designation).</p>	<p><u>1003.4156, F.S. General requirements for middle grades promotion.</u>          1. (e) One course in career and education planning to be completed in 6th, 7th, or 8th grade. The course may be taught by any member of the instructional staff. At a minimum, the course must be Internet-based, easy to use, and customizable to each student and include research-based assessments to assist students in determining educational and career options and goals. In addition, the course must result in a <u>completed personalized academic and career plan</u> for the student; must emphasize the importance of entrepreneurship skills; must emphasize technology or the application of technology in career fields; and, beginning in the 2014-2015 academic year, must include information from the Department of Economic Opportunity’s economic security report as described in s. <u>445.07</u>. <u>The required personalized academic and career plan must inform students of high school graduation requirements, including a detailed explanation of the diploma designation options provided under s. 1003.4285;</u> high school assessment and college entrance test requirements; Florida Bright Futures Scholarship Program requirements; state university and Florida College System institution admission requirements; available opportunities to earn college credit in high school, including Advanced Placement courses; the International Baccalaureate Program; the Advanced International Certificate of Education Program; dual enrollment, including career dual enrollment; and career education courses, including career-themed courses and courses that lead to industry certification pursuant to s. <u>1003.492</u> or s. <u>1008.44</u>. <u>Each student shall complete a personal education plan that must be signed by the student and the student’s parent.</u></p> <p><u>1003.4285, F.S. Standard high school diploma designations.</u>          (2) Students and parents shall be provided information about diploma designations through an online education and career planning tool, which allows students to monitor their progress toward the attainment of each designation.</p>
<p>4.</p>	<p>The vendor will provide system level training to individuals identified by UWF in advance of system deployment.</p>	
<p>5.</p>	<p>The vendor must provide detailed description of compliance with the Children’s Online Privacy Protection Act of 1998 (COPPA) and the Family Educational Rights and Privacy Act (FERPA).</p>	
<p>6.</p>	<p>The system must meet requirements of</p>	<p>Functionality required by Rule 60-8.002, F.A.C.</p>

	<p>section 508 of the Rehabilitation Act of 1973 and associated state of Florida statutes.</p>	
<p>7.</p>	<p>The system must be available at all times for access by students.</p>	<p>1006.735            (4) STATEWIDE ONLINE STUDENT ADVISING SERVICES AND SUPPORT.—The Complete Florida Plus Program shall make available on a statewide basis online services and support, including:            (b) A K-20 statewide computer-assisted student advising system which shall support career and education planning for the K-12 system and the process of advising, registering, and certifying postsecondary students for graduation and which shall include a degree audit and an articulation component. Florida College System institutions and state universities shall interface institutional advising systems with the statewide computer-assisted student advising system. At a minimum, the statewide computer-assisted student advising system shall:  <u>1. Allow a student to access the system at any time.</u>  <u>2. Support K-12 career and education planning required by s. 1003.4156(1) (e).</u>  <u>3. Allow a student to search public postsecondary education institutions and identify course options that will meet the requirements of a selected path toward a degree.</u>            4. Audit transcripts of students enrolled in a public postsecondary education institution to assess current academic standing, the requirements for a student to transfer to another institution, and all requirements necessary for graduation.            5. Serve as the official statewide repository for the common prerequisite manual, admissions information for transferring programs, foreign language requirements, residency requirements, and statewide articulation agreements.            6. Provide information relating to career descriptions and corresponding educational requirements, admissions requirements, and available sources of student financial assistance.            7. Provide the admissions application for transient students pursuant to paragraph (a) which must include the electronic transfer and receipt of information and records for:            a. Admissions and readmissions.            b. Financial aid.            c. Transfer of credit awarded by the institution offering the course to the transient student's degree-granting institution.</p>



## Section II

### SCOPE OF SERVICES

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#### A. Scope of Services

UWF desires the most thoroughly developed and highest quality system and associated operation and support services available. The following specifications outline the minimum firm requirements for the proposed system and related services. They are provided to assist participants in understanding the objectives of UWF and submitting a thorough response.

Responses received must reflect in detail the inclusion of the systems and services and the degree to which they are provided.

#### A.1 Overview of Services

The contracted party (hereafter “vendor”) must provide a comprehensive career and education planning (Internet-based) system, hereafter referred to as “System,” that allows both K-20 students (elementary through postsecondary) and adult Florida residents to acquire the knowledge necessary to investigate the world of work and education and make informed career and education decisions. The System must be developed appropriately by age, grade, and user type for the varied needs of all users, who may be either children or adults. This System must meet the requirements outlined in relevant Florida Statutes, as previously identified in Section 1 (H) of this Request for Proposals.

In addition to the System itself, the vendor must provide the following services necessary to the operation of the System:

1. System implementation services, consisting of all activities necessary to deliver a fully functional system that is successfully utilized by Florida’s K-20 education system and Florida residents.
2. System operation services, consisting of the following categories of service:
  - a. Platform service – the vendor shall provide an operating infrastructure platform for the System, either via cloud hosting or by using equipment resident at the Florida’s Northwest Regional Data Center.
  - b. Instance delivery – the vendor shall provide fully functional operating instances of the System on the platform. Separate test, training, and production instances shall be provided.
  - c. Platform and System technical support – the vendor shall resolve errors and malfunctions identified in the operating platform and System.
3. System update services, consisting of:
  - a. Release and installation of enhancements and upgrades to the System and platform.
  - b. Updates to the content housed in the System.
4. User support services, consisting of supporting both Complete Florida staff who are responsible for the System and also Florida’s residents who utilize the system, via documentation, training materials, train-the-trainer services, and help center services. The ability to integrate with existing programmatic help desk services should be addressed.
5. The vendor will provide their proposed service level agreement (SLA) for services outlined in this section, including but not limited to, response time, availability, performance, and service request responses. The parameters of these agreements will be negotiated to meet UWF’s requirements.
6. The vendor will identify all required resources from UWF for the implementation and ongoing support of the system. This would include all staff, support, hardware, software, environment, data, and other resources required.

Required elements of this scope of work and deliverables are outlined in the following sections.

## **A.2 System Requirements**

The following sections identify minimal requirements for the System, which must be met in order for the system to comply with programmatic components identified in Florida Statutes.

### **A.2.1 System Functional Requirements**

1. The System should be designed in such a way that will allow it to be used in a variety of settings with various types of users, including but not limited to use in K-12 schools, colleges and universities, career centers, employment and training centers, and military installations.
2. The System must be functional on all prevalent Internet browsers, on traditional computer platforms and also mobile (e.g., tablet and smartphone) devices, and include responsive design features for operating across the full range of display screen sizes and device capabilities.
3. The System is required to have the following components integrated at a minimum: interests, skills, and values research-based assessments; middle and high school course planning tools; information on postsecondary training and education institutions (Florida and national) and their respective programs of study (certificate, degree); financial aid and scholarship information and search; and job search functionality.
4. The System must allow at no-charge the self-creation of user-specific accounts for residents of Florida.
5. The System must include a national and Florida education and training information file for educational programs and educational institutions. The education and training options shall include, but are not limited to: state universities, colleges, school district career centers, professional schools, private proprietary schools, and private not-for-profit schools. Education and training options must be provided in detail along with a searchable database for the user. A list of search criteria for the users within the system must be included.
6. The System must allow users to conduct an alphabetical search of financial aid (federal and state-specific) and scholarship awards by title as well as Florida-specific financial aid such as the Bright Futures Scholarship. The vendor should provide details of financial aid search options and tools associated with making informed financial aid decisions.
7. The System must be integrated with an industry validated, research-based interest assessment with results that must link to occupations and must have the ability for users to identify their personal work values and match them to career options. The assessment must be clearly defined and research-aligned to provide career awareness and decision making tailored for K-20 students, returning adult students, and veterans and military. Continuing research on validity, reliability and relevance of data assessments and careers is required.
8. The System must include a feature designed for middle grade students to create a personalized high school course plan, based on their projected high school course offerings.
9. The System must permit high school students to edit their personalized high school course plan that was created while in the middle grades or create a new one for their use.
10. The System must allow students to determine high school course progress in relation to satisfaction of minimum high school graduation requirements and in achieving personal goals of entering state university system, state college system, state scholarship programs, etc.
11. The System must have the ability for parents to track their child's progress towards each standard high school diploma designation (scholar and/or merit designation).

12. The System must provide educator resources for K-12, and give a detailed list of all lesson plans and activities.
13. The System must have validated relevant national occupations and education and training information that is in a searchable database and has the ability to generate individual reports for users. A list of information available in the databases for the user to narrow an occupational search must be provided. A description of how the System interfaces with various occupational and training databases should also be included.
14. Occupational wage and projection data on the Florida and local levels must be included in the System and easily obtained in a report format for the user.
15. Fully integrated military occupational and training data from the U.S. Department of Defense is required.
16. To assist veterans, military and adult learners, the System must provide user analysis of developed skills and work experience in correlation to available occupations. The vendor will provide a detail of information available to adult users.
17. The vendor must provide a secure management system that allows for multiple accounts and tools to analyze and create reports on user data for the purposes of large data analytics and statistics.
18. The vendor must provide a comprehensive list of the reports which can be generated by the System by user type including: students, parents, veterans and military, adult learners, institutions, and management.
19. A link to the Department of Economic Opportunity's Economic Security Report s. 445.07 F.S. in a prominent location in the System is required.
20. The vendor must provide detailed description of compliance with the Children's Online Privacy Protection Act of 1998 (COPPA) and the Family Educational Rights and Privacy Act (FERPA).
21. The System must meet requirements of section 508 of the Rehabilitation Act of 1973 and associated State of Florida statutes.
22. The System must have the ability to auto-create user accounts for K-20 students using data files provided for that purpose in compliance with COPPA.
23. The System should consider a process for easy translation for languages.

### **A.2.2 System and Platform Performance Requirements**

1. The production System and its platform must operate with 99.99% ("four nines") availability. Vendor shall specify in proposal response the high availability features of the proposed production System and platform. Outages for System upgrade and maintenance purposes shall be scheduled at times agreed upon by UWF.
2. The production System and its platform must provide data loss protection, in the event of a catastrophic failure, of no more than two hours data loss (recovery point objective).
3. The production System must support a number of user accounts and concurrent users, with adequate response time, sufficient to meet the State's needs. Vendor shall specify in proposal response the total number of user accounts, total concurrent users, and System response time at maximum concurrent users that will be provided by the proposed production System.
  - a. Florida Population exceeds 19 million, the following is a breakdown of most likely user populations:

- i. Pk-3 Grades: 767,873
- ii. 4-8 Grades: 981,139
- iii. 9-12 Grades: 723,740
- iv. Career Education: 61,710
- v. College: 875,000
- vi. University: 335,000
- vii. Adult Learners, Job Seekers and Military: 2,200,000

### **A.2.3 Technical Requirements**

1. The System and its platform shall provide user account and information security protection appropriate for the protection of personal and academic data stored in the system. Vendor shall specify in response the security features and designs of the System and platform.
2. Vendor shall specify in response if use of the System requires third-party software components on the user's end device, other than the Internet browser (e.g., Adobe Acrobat, browser plug-ins, etc.).
3. If the System platform is not cloud-based, the System must utilize a platform hosted at the Northwest Regional Data Center (NWRDC) for hosting all data and software applications comprising the System. Vendor shall specify in response the complete platform architecture for a non-cloud-based system, for test, training, and production instances.

### **A.3 System Implementation Services**

1. Vendor shall provide a complete System implementation plan, covering at minimum the phases of needs assessment and requirements discovery, System setup and integration (including loading of data from associated systems), System configuration, training, System launch, and post-launch quality assurance.
2. Vendor shall provide an implementation team including a dedicated Project Manager.
3. The vendor will identify the full complement of materials, as well as support and training services, required and provided for complete implementation and sustained System utilization. The vendor will provide System level training to individuals identified by UWF in advance of System deployment.

### **A.4 System Operation Services**

1. Vendor shall provide a highly responsive service for accepting and responding to problem reports with the System or its platform.
2. Vendor must identify in response to this proposal all operational and System administration responsibilities that are not borne by the Vendor.

### **A.5 System Update Services**

Vendor's response to this proposal must describe fully the methods and schedules used to provide the following categories of System updates:

1. Software bug fixes.
2. Updated content, as is relevant to functional requirements 5, 6, 7, 12, 13, 14, and 15.
3. Software updates, enhancements, and new features.
4. Compatibility updates for client browser platforms.

### **A.6 User Support Services**

Vendor shall provide user support services, at minimum, to the following categories of users:

- System administrators, who are responsible for managing the operation of the system and for providing information reports and metrics from the system.

- University, college, and school personnel – such as advisors and career counselors – who advise students in their use of the system.
- End users of the system, students and Florida residents, who use the system for career and education planning.

Vendor’s response to this proposal must describe fully the type of support, delivery mechanisms, response times, and hours of availability for each of these levels of user support.

### Section III

#### SPECIAL TERMS AND CONDITIONS

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##### A. Term of Contract

The proposal is to cover an initial period of five (5) years with an option to renew services for three (3) additional five (5) year periods pending available state appropriated funds. 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. Public Records

This Agreement is subject to the requirements of Chapter 119, Florida Statutes (Public Records Law). UWF may unilaterally cancel this Agreement for refusal by Contractor to allow public access to all documents, papers, letters, or other material subject to the provisions of Chapter 119, Florida Statutes, and made or received in conjunction with this Agreement.

Further, Contractor agrees that, to the extent it may meet the definition of a “contractor” within the meaning of Section 119.0701, Florida Statutes, it will:

1. Keep and maintain public records that ordinarily and necessarily would be required by UWF in order to perform the services performed by Contractor under the Agreement.
2. 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, Florida Statutes, or as otherwise provided by law.
3. 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.
4. Meet all requirements for retaining public records and transfer to UWF, at no cost, all public records in possession of Contractor upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to UWF in a format that is compatible with the information technology systems of UWF.
5. The failure of Contractor to comply with the provisions set forth shall constitute a default and breach of this Agreement and UWF shall enforce the default in accordance with the provisions set forth herein.

## Section IV

### RFP INFORMATION AND INSTRUCTIONS

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#### 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.
- Vendor should examine its solicitation response carefully for any errors prior to submission. The Vendor is solely responsible for the accuracy and completeness of its solicitation response. In case of Vendor's errors in extensions, the unit price will prevail.
- At 2:00 p.m. on the solicitation Response due date, UWF will open all timely submitted solicitation responses for the sole purpose of recording the names of the Vendors submitting solicitation responses.
- 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
  - Vendor'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)
- Signed Certification Regarding E-Verify System
- Any required license or other required document(s) – *Specify what those licenses or required documents are.*

##### 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 the system and services as outlined in this solicitation. Include experience with large scale systems, subject populations and demonstrated work with veterans and military.
- Provide a listing of professional organizations of which the company 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.
- How many customers has the respondent lost or gained in the past five (5) years? Provide reasons for losses.
- Over the past five (5) years, has your company or any of its affiliates or parent, or any officer or principal been involved in any business litigation or legal proceedings and of more than \$5,000?

**Tab C Personnel**

Provide names, titles, and résumés of the key individuals who will be assigned to provide this system and services to the University. Include the year each individual joined the firm and their current responsibilities, experience, education, and professional designations. Detail their roles and the scope of their involvement for this assignment.

**Tab D Service Description**

- Provide a description of the approach the respondent will take in providing the system and services outlined in this solicitation, **covering all elements outlined in the Scope of Services**. Include experience with large scale system implementation, subject populations, and demonstrated work with veterans and military.
- Provide list of “deliverables” to accomplish proposed outcome, **covering all elements outlined in the Scope of Services**.
- Provide project timeline to coincide with deliverables.
- All deliverables must align to requirements in accordance with Florida Statutes **s.1000.03 (5) (g), 1003.4156 (1) (e), 1003.4285 (2), 1004.93 (8) and 1006.735**.

**Tab E Other Considerations**

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

**Tab F References**

Provide at least three references for whom you have provided the same or similar system and services within the last 3 –5 years. Each reference should include the Company Name, Contact Name, Current Phone Number, **and E-mail address**.

**Tab G Consultant Agreement**

Review Attachment C for the University'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. The University 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 the University'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-02AJ. Do not include in the 3-ring binders. Submit the pricing on the sheet provided (See Attachment E). Vendor may not modify or alter price sheet, provide separate price quotes attached to the Proposal or submit pricing in any other form.

Respondents must supply the lump sum total cost optional five (5) year renewal for the entire project/engagement as proposed. Lump sum total cost to include any and all costs or expenses (i.e. travel) to complete. Vendors should not base their cost proposals on their standard business terms or practices or any reduced level of commitments or obligations Vendor believes it may negotiate.

Travel, living, and all other out-of-pocket expenses are to be part of and included in the lump sum cost. No alternative pricing will be accepted.

The Cost Proposal should also include, for informational purposes only:

- Additional system services and support in excess of the minimum requirements available for a 5-year period.

## Section V

### **SELECTION PROCESS, EVALUATION PROCESS AND CRITERIA**

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#### **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, 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 determination of the companies selected for the short list will be based on evaluation of the written response submitted. There will be no opportunity for presentations at this stage. Any response that does not provide complete, accurate, and detailed answers to each questions or which indicates the company prefers to defer providing complete details until a later stage in the process, may be declared non-responsive and rejected without further evaluation.

#### **A.1 System Demonstration and Presentation**

The shortlisted vendors will be required to perform a *System Demonstration and Presentation* for the Evaluation Team. The *Demonstration* must illustrate the System features using the use cases described below. The *Presentation* must describe fully the vendor’s implementation plan and user support services plan, using the scenarios identified below.

The *Demonstration and Presentation* will be conducted on the University of West Florida Pensacola campus, and must complete within an allotted three-hour time period, with approximately two hours allotted for the System Demonstration and one hour for the implementation and services Presentation.



### **A.1.1 System Demonstration Use Cases**

Vendor's demonstration of the proposed System must illustrate use of the system through the following use cases:

1. A middle grade student in a Florida middle school uses the system for the first time to identify her career interests and explore high school and college majors relevant to that career. She subsequently returns to the system to plan a possible high school course schedule.
2. A parent of a middle school student wants to use the system to identify possible career fields in Florida for their student based on interests/aptitudes and wants to learn about the career pathways into that career field including the various high school curriculum options.
3. College and university students upload their program and courses and it is easily integrated with the various types of systems at institutions e.g. Banner.
4. Career counselors and advisors want to assist a student or adult in developing an educational and career plan.
5. The Military and Veterans want to include their training and certifications in their user file to determine what careers may best utilize their skills.
6. An adult returning to college or university needs to upload previous transcripts from many years past into the user account.
7. Career and Technical students as well as adult users will need interface and integration with continuing education and certification programs.
8. An adult user is interested in a career change and wants to run a report on various occupational wages and employment projections in Florida.
9. A Career Academy student needs to determine where articulation credits could be used at various colleges/technical schools.
10. A CareerSource Florida user wants to track their training, education and certifications in one location for career planning purposes.

### **A.1.2 Presentation Scenarios**

Vendor's presentation of implementation and user support services must cover the following scenarios:

1. Demonstrate how various users create an account.
2. Demonstrate how in a phased System roll-out to K-12 school districts, a school district begins using the system for middle school career counseling.
3. Demonstrate how data is securely transferred from other systems/institutions.
4. Demonstrate how a state college or university deploys the system for use by its students and career counselors.
5. Demonstrate how privacy is ensured and a parent of a 10<sup>th</sup> grader is verified so they may track their child's progress toward high school diploma designation.
6. Demonstrate how support services will assist a middle-aged Florida resident who wishes to use the system to explore mid-career options, and is having difficulty creating a user account.

7. Demonstrate multiple report capabilities.
8. Demonstrate vendor support for Systems Administrators in troubleshooting.
9. Demonstrate how CareerSource Florida or local workforce boards could identify and assist users with attending educational programs, internships or professional workshops for job placement.

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

**B. Evaluation Criteria and Weights**

- |    |  |     |
|----|--|-----|
| 1. | Quality of system, based on conformance to functional and technical requirements | 50% |
| 2. | Quality of proposed implementation plan and timeline                             | 20% |
| 3. | Quality of proposed operation and support services                               | 20% |
| 4. | Cost proposal  | 10% |

***Note: Reference checks may be conducted after firms have been short-listed or after final recommendation is made.***

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 the University 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. Contract Award**

UWF intends to award a Contract resulting from this competitive solicitation to the Successful Vendor whose solicitation response, and all the terms and conditions found on the Sample Contract (see Attachment C). The Contract will also incorporate any clarifications, and if negotiations are conducted, any additional terms and conditions that are negotiated.

The University reserves the right to reject any and all proposals or portions thereof. The University reserves the right to withdraw this RFP or a portion of this RFP without making an award if such action is in the University's best interest.

The University 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. The University reserves the right to award without negotiation if deemed in the best interest of the University.

If the University determines that a company awarded a contract based on this RFP does not honor all agreements reached during the negotiations, the University reserves the right to immediately cancel the award, and to place the company on the University's suspended vendor list.