IOWA STATE UNIVERSITY
REQUEST FOR PROPOSAL NUMBER 63342
FOR
ACQUISITION OF A SOCIAL COMMUNITY SOFTWARE SOLUTION

Purchasing Department
3616 Administrative Services Building
Ames, Iowa 50011-3616

April 8th, 2016
RFP No. 63342

SECTION I

RFP INFORMATION AND INSTRUCTIONS

1.0 Introduction Iowa State University is soliciting proposals from qualified companies for the acquisition of a social community, Software as a Service (SaaS), collaboration solution. Companies are asked to respond to the specifications within this document as completely as possible. The successful supplier will also be expected to assist with the implementation of the proposed system. Other Iowa Regents Universities, which includes the University of Iowa, The University of Northern Iowa, The Iowa Braille and Sight Saving School and the Iowa School for the Deaf, and the State of Iowa may have an interest in awarding contracts based on the outcome of this RFP. Companies should indicate in their response their willingness to allow these entities to participate in the contract awarded from this RFP.

Companies should read all materials carefully and note the due date. All questions and comments in reference to this Request for Information must be directed to:

Deb Dedecker  
Purchasing Agent  
1340 Administrative Services Bldg.  
2221 Wanda Daley Drive  
Iowa State University  
Ames, IA 50011-1004  
515-294-8621  
dkdeedeck@iastate.edu

1.1 Parties to the Contract Company must identify all parties who will be involved with performance of the contract. By submitting a proposal, the Company warrants that all parties to the contract have received a copy of this RFP and that the Company’s proposal is acceptable to these parties.

1.2 Each Company, by submitting a proposal, represents that Company has:

1.2.1 Read and completely understood the proposal documents contained in this RFP.

1.2.2 Based their proposal upon the requirements described in the proposed Contract Documents.

1.2.3 Signed the proposal by an authorized representative.
1.3 Receipt and Opening of Proposals

1.3.1 Proposals are to be submitted via email to quotedesk@iastate.edu or by mail and labeled "RFP 63342: Social Community Software Solution". Electronic submissions should be submitted in one (1) PDF or similar electronic file. Proposals must be received in the ISU Purchasing Department, 1340 Administrative Services Building, 2221 Wanda Daley Drive, Ames, Iowa 50011-1004 by 3:00 P.M. CST on April 22nd, 2016. Any proposal received after the time specified for the receipt of proposals may not be considered and may be returned unopened.

Proposals, which are delivered personally, are to be brought to the Purchasing Department front desk located at the south entrance of the 1st Floor Administrative Services Building (ASB). The ASB building is located at the southwest corner of the intersection of Stange Road and 13th Street.

If submitting proposal by mail, one (1) original hard copy and one (1) electronic copy of the proposal are to be submitted to the ISU Purchasing Department in response to this RFP. The electronic copy can be submitted on a CD or thumb drive. No hard copy is required if submitting by email. Please submit the electronic version as one (1) file and not multiple files.

1.3.2 ISU reserves the right to accept or reject any or all proposals and to waive any irregularities, technicalities, or informalities in proposals if such waiver does not substantially change the offer or provide a competitive advantage to any Company. ISU reserves the right to request additional documents or proposal clarifications after the due date and time for proposal submission.

1.3.3 Company's legally authorized representative (Officer of Company) shall sign the proposal. The official name, address, telephone, and fax number and e-mail addresses are to be stated on the proposal form.

1.3.4 No responsibility will be attached to any person for premature opening of a proposal not properly identified.

1.3.5 The laws of the State of Iowa require the contents of all proposals be placed in the public domain and be open to inspection by interested parties. Trade secrets or proprietary information that are recognized as such and are protected by law may be withheld, if clearly identified as such in the proposal. Proposals marked entirely confidential or proprietary may be rejected. Pricing information and other offers cannot be considered proprietary information.

Failure to list all proprietary sections of the submitted proposal in the space provided on the Form of Proposal shall relieve ISU personnel from any responsibility, should such information be viewed by the public, a competitor, or be in any way accidentally released.

1.3.6 All opened proposals become the property of ISU and will not be returned to the offeror.
1.3.7 Prior to the date and time designated for receipt of proposals, proposals submitted early shall be withdrawn only by written notice to ISU. Such notice shall be received by ISU prior to the designated date and time for receipt of proposals.

1.3.8 Withdrawn proposals may be resubmitted up to the time designated for receipt of proposals provided that they are then fully in conformance with these Proposal Instructions and Conditions.

1.3.9 No proposal may be modified or withdrawn for a period of ninety (90) calendar days after the scheduled closing time for receipt of proposals.

1.3.10 All erasures or corrections are to be initialed by the person(s) signing the proposal.

1.3.11 Failure to comply with the requirements of this RFP or evidence of unfair bidding procedures may be cause for rejection of the proposal. Failure to supply information requested may also be cause for rejection of the RFP as being non-responsive.

1.3.12 This Request for Proposal does not commit ISU to make an award, nor will ISU pay any costs incurred in the preparation and submission of proposals, costs incurred in making necessary studies for the preparation of proposals, or any travel or personnel expenses associated with trips to ISU.

1.4 **Addenda** Any and all interpretations, corrections, revisions, and amendments shall be issued by the ISU Purchasing Department to all known holders of the Proposal Documents in the form of written addenda. Except for addenda modifying the proposal due date or canceling the Request for Information, such addenda shall be issued so as to be received at least five (5) days prior to the time set for receipt of proposals. All addenda so issued shall become part of the Contract Documents and shall be acknowledged in the Form of Proposal.

1.5 **Proposal Obligations** The Contractual Agreement (Agreement) shall incorporate the selected Company's proposal, including any clarification to the proposal(s) requested by ISU and submitted by selected Company, except as amended by mutual agreement. The Agreement shall form the contractual obligation of ISU and the selected Company.

1.6 **Exceptions to Contract Documents** Company shall clearly state in the submitted proposal any exceptions to, or deviations from the Scope of Work (Section III), and any exceptions to the provisions, terms, and conditions of this RFP included in Section I and terms and conditions of the potential agreement described in Section II. Such exceptions or deviations will be considered in evaluating the proposals. Any exceptions should be noted on Attachment A and returned with the submitted proposal. Companies are cautioned that exceptions taken to this RFP may cause their proposal to be rejected at the sole discretion of ISU. Exceptions not stated on Attachment A will have no effect.

1.7 **Qualification of Company** ISU shall make such investigations as deemed necessary to determine the ability of Company to provide the expected goods or services. ISU reserves the right to reject any proposal if the evidence submitted by, or investigation of, such Company fails to satisfy ISU, in its sole opinion, that said Company is properly qualified to carry out the obligations specified herein.
1.8 **Vendor Database** Companies **must** have a current vendor registration on file in order to receive an award resulting from an RFP. Companies may validate that they have a registration on file with ISU by visiting the following link:

https://accessplus.iastate.edu/NonAuth/PD10/PD162.jsp

If you do not have a current registration on file, please visit the vendor registration link (shown below) for instructions on the vendor registration process.

https://accessplus.iastate.edu/NonAuth/PD10/PD155Vendor.jsp

1.9 **Formation of Agreement** ISU may accept a proposal as written by issuing a Contractual Agreement, prepared by ISU and signed by all parties; or ISU may enter into negotiations with one or more companies in an effort to reach a mutually satisfactory Contractual Agreement that will be executed by all parties and will be based on this Request for Information.

1.10 **Iowa Preference Law**

1.10.1 Preference shall be given to purchasing products produced within the State of Iowa, when they are of a quality reasonably suited to the purpose intended, and can be secured without additional cost over foreign products or products of other states, according to Code of Iowa §§73.1.

1.10.2 Preference shall be given to purchasing from Iowa based businesses if the offers submitted are comparable in price to those submitted by other suppliers and meet the required specifications, according to the Code of Iowa §§73.1.

1.11 **Presentation/Demonstration** Once the proposals have been received and evaluated, ISU will rank the proposals based on the evaluation criteria. Companies with the highest rankings may be requested to perform a presentation and/or a web based demonstration (demo) of the products and proposed relationship offered in response to this proposal. ISU will provide a list of items to be discussed in advance of the demo request.

1.12 **Proposal Evaluation** The Evaluation Criteria utilized for this Request for Information will be based upon, but not limited to, the following criteria which are listed in no particular order:

- Previous satisfactory performance of the solution based on references
- Experience with implementing system to peer Universities and enterprise corporations
- Meeting the specifications/requirements of this RFP
- Exceptions taken to this RFP
- Functionality and ease of use for system users
- Forms of support offered
- Responses to Solution Questionnaire
- Total cost of product
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SECTION II

Scope of Work

2.1 Campus Background

Iowa State University of Science and Technology (ISU), Ames, Iowa, was chartered by the State General Assembly in 1858. Iowa was the first state to accept the terms of the Morrill Land Grant Act of 1862, and in March, 1864, the General Assembly awarded Iowa’s grant to the University, known then as the Iowa Agricultural College. Since 1959, the University has been known as Iowa State University of Science and Technology.

The University pioneered in the establishment of agricultural curricula and was the first state institution to found a veterinary school. Experimentation and research have been integral parts of the University from its beginning, first in agriculture, and later in home economics, engineering, veterinary medicine and the physical and social sciences.

Fall 2015 headcount enrollment at the University is 36,001 students.

The University is accredited by the North Central Association of Colleges and Secondary Schools as well as by appropriate professional organizations. It is also a member of the Association of American Universities.

The University is organized into the following undergraduate colleges: the College of Agriculture and Life Sciences, the College of Business, the College of Design, the College of Engineering, the College of Human Sciences, and the College of Liberal Arts and Sciences. These colleges each grant bachelor’s degrees. The Graduate College administers the graduate programs of the colleges and confers the master’s degree and doctor of philosophy. The College of Veterinary Medicine awards the doctor of veterinary medicine degree.

2.2 Scope of Work

Iowa State University is seeking proposals from companies for a social community, Software as a Service (SaaS), cloud solution to manage and enhance the student and employee experience. The software will be employed to improve support operations by enabling customer self-help, peer-to-peer support communities, and improving the overall efficiency of the support operation through call deflection, selective escalation, and productive collaboration.

Faculty, staff, and students have several options for obtaining support at the university. A central help desk, called the Solution Center, provides technical assistance
through walk-in, telephone, and scheduled appointments. Additionally, each of the seven colleges provides on-site support functions customized to their respective college.

The desired software product will provide both public and internal facing functionality. ISU wishes to establish a robust intranet comprised of all university support staff to enhance their peer-to-peer interactions, foster an environment of collaboration, and serve as a platform for improved service offerings.

2.3 **Timeline** ISU desires to have a system in place by June 1, 2016.
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SECTION III

TERMS AND CONDITIONS OF THE CONTRACT

3.1 Definitions

The University  The University is Iowa State University (ISU). The term University means the University or the University's authorized representative.

The Company  The Company is the person or organization to which the University will issue a contract purchase order, when/if award of this Request for Information is made. The term Company means the Company or the Company's authorized representative.

The following conditions will apply to any contract awarded as a result of this RFP:

3.2 Assignment  This contract may not be assigned or transferred by either party without the prior written consent of the other party.

3.3 Non-appropriation of Funds  Notwithstanding other provisions of any award resulting from this RFP, if funds anticipated for the fulfillment of this agreement are at any time not forthcoming or insufficient, either through the failure of the Iowa Legislature or the federal government to provide funds or the program under which funds were provided is altered, then ISU shall have the right to terminate this agreement without penalty by giving not less than thirty (30) days written notice documenting the lack of funding or program change.

3.4 Immunity from Liability  Every person who is a party to this Agreement is hereby notified and agrees that ISU, and its agents, successors, and assigns are immune from liability and suit for or from Company's activities involving third parties and arising from this Agreement.

3.5 Indemnification

3.5.1 To the fullest extent permitted by law, Company shall defend, indemnify, and hold harmless ISU, its agents, successors, and assigns, and the Board of Regents, State of Iowa, from and against all claims, damages, losses, and expenses, including but not limited to attorneys’ fees, arising out of or resulting from the performance and compliance with the terms and obligations of the Agreement, provided that any such claim, damage, loss, or expense (1) is attributable to bodily injury, sickness, disease, or death, or to injury to or destruction of tangible property, including the loss of use resulting there from, and (2) is caused in whole or in part by any negligent act or omission of Company, and subcontractor, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, regardless of whether or not is caused in part by a party indemnified hereunder. Such obligation shall not be construed to negate, abridge, or otherwise reduce any other right or obligation of indemnity, which would otherwise exist as to any party or person.
3.5.2 ISU will be exempt from any and all liability for any credit card breaches as a result of using this service.

3.5.3 In any and all claims against ISU, its agents, successors, and assigns, and the Board of Regents, State of Iowa, by any employee of Company, and subcontractors, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, the indemnification obligation shall not be limited in any way by any definition or boundary on the amount or type of damages, compensation or benefits payable by or for Company or any subcontractor under worker’s or workmen’s compensation acts, disability benefit acts or other employee benefit acts.

3.6 **Code of Fair Practice** Company shall not discriminate against any employee or applicant for employment because of race, color, religion, sexual orientation, gender identification, marital status, national origin, sex, age, or physical or mental disability, or status as a US veteran. Company shall take affirmative action to ensure that applicants are employed and that the employees are treated during employment without regard to their race, creed, color, religion, national origin, sex, age, or physical or mental disability or status as a Vietnam-era/disabled veteran, except where it relates to a bona fide occupational qualification. Such action shall include but not be limited to the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or terminations; rates of pay or other forms of compensation; and selection for training, including apprenticeship. If applicable to this agreement, Company shall comply with the provisions of Federal Executive Order 11246 as amended by Executive Order 11375. In the event of Company’s non-compliance with this section 3.6 or with any of the aforesaid regulations, this contract may be canceled, terminated or suspended in whole or in part, without penalty to the Board of Regents, State of Iowa, the University, or the State of Iowa, and Company may be declared ineligible for further contracts with Board of Regents, State of Iowa, institutions.

3.7 **Subcontractors** Company is specifically advised that any person, firm, or other party to whom it awards a subcontract under this Agreement must be approved in advance and be acceptable to ISU. The Company is responsible for all acts of its Subcontractors, as well as the Subcontractors’ performance of delegated duties. Company shall be solely responsible for payment to all subcontractors or secondary suppliers that the Company may engage for the completion of any contractual agreement with ISU.

3.8 **Targeted Small Business** The University is committed to the development of Targeted Small Businesses, a State of Iowa program. If subcontracting is necessary, the contractor will make every effort to use Targeted Small Businesses in the performance of this contract. A report will be required at the completion of the contract indicating the extent of Targeted Small Businesses participation. A description of the Company’s expected efforts to solicit Targeted Small Businesses participation should be enclosed with the proposal.

3.9 **Amendments to the Agreement** When awarded, the Agreement shall not be changed, modified, altered, or amended in any respect without the mutual consent of the parties hereto, which consent shall be evidenced by a written amendment to the Agreement executed by both parties.

3.10 **Contractor’s Liability Insurance** Company shall purchase and maintain, throughout the term of this agreement, comprehensive general liability insurance, including contractor’s liability, and comprehensive automobile liability insurance to protect Company from all claims for bodily injury,
including accidental death, personal injury, and property damage arising from operations under this agreement, whether such operations be by Company, or by anyone else directly or indirectly employed by Company. Company shall also maintain comprehensive automobile liability insurance coverage to protect against all claims arising out of the transportation associated with their operations. In addition, all statutory insurance requirements, including worker’s compensation, shall be met. All required insurance policies shall be issued by reputable insurance companies duly authorized to engage in the insurance business in the State of Iowa. Limits of such insurance shall be as stated as follows:

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<th>Type of Insurance</th>
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<td>Worker’s Compensation</td>
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<td>Comprehensive Auto Liability</td>
<td>$1 million per occurrence*</td>
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<td>*With $2 million aggregate each category.</td>
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The State of IOWA, Iowa State University, and the Board of Regents, State of Iowa, shall be named on such policies as additional insureds. Within ten (10) days of receipt of “Notice of Award”, Company shall provide Owner with one (1) certificate of insurance, in a form acceptable to Owner, showing that Company is in compliance with the above conditions. The certificate shall also provide that should the policy be canceled or materially changed, thirty (30) days written notice prior to the effective date for the change or cancellation, shall be given directly to the ISU Purchasing Department.

3.11 **Laws** Terms and provisions of this Agreement shall be construed in accordance with the laws of the State of Iowa, and any and all litigation or actions commenced in connection with this Agreement shall be instituted in the appropriate courts in the State of Iowa.

3.12 **Use of Name or Intellectual Property** Company agrees it will not use the name or any intellectual property, including but not limited to, any University trademarks or logos in any manner, including commercial advertising or as a business reference, without the expressed prior written consent of the specific institution and the University.

3.13 **Taxes** ISU is exempt from Federal Excise Taxes, and no payment will be made for any taxes levied on Company’s employee’s wages. ISU is exempt from State and Local Sales and Use Taxes on the services. A Tax Exemption Certificate will be furnished upon request.

3.14 **Access to Company Records/Audits** The Company agrees to keep and provide full access to all records that pertain to ISU throughout the period that the Agreement remains in effect and for a minimum of seven (7) years after the Agreement is terminated, unless required to retain for a longer period by state or federal statute.

3.15 **Termination**

3.15.1 If Company is adjudged bankrupt or makes a general assignment for the benefit of creditors, if a receiver is appointed on account of Company's insolvency, if Company repeatedly refuses or fails to supply enough employees, management staff, or equipment to adequately provide timely delivery or services for ISU, or if Company is otherwise guilty of a substantial violation of the Contract Documents, ISU may terminate the
Agreement after giving Company a minimum thirty (30) days written notice, without penalty to ISU.

3.15.2 In any case where Company has failed to provide items or services or has provided nonconforming items or services, ISU shall provide a Cure Notice. If after notice Company continues to be in default, ISU may procure services from another source and terminate the Agreement, without penalty to ISU.

3.16 Severability of the Agreement In the event any one or more of the provisions contained herein shall for any reason be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provision, but shall be construed as if such invalid or unenforceable provision had never been contained. Further, in the event that any provision shall be held to be unenforceable by virtue of its scope, but may be made enforceable by a limitation thereof, such provision shall be deemed to be amended to the minimum extent necessary to render it enforceable under the laws of the jurisdiction in which enforcement is sought.

3.17 Availability of Contract to Other State Agencies Iowa State University, The University of Iowa, the University of Northern Iowa, The Iowa School for the Deaf, and the Iowa Educational Services for the Blind and Visually Impaired are all governed by the Board of Regents, State of Iowa. Unless reasonable objection is made in writing as part of your response to this Request for Proposal, the Board or the other entities and their affiliates (e.g. Ames Lab at Iowa State University) or the State of Iowa may purchase from any contract resulting from this Request for Proposal.

3.18 Term of the Contract ISU desires to enter into an agreement for 2 years with options to renew annually based on satisfaction. Vendors are encouraged to explain any differential pricing for longer term periods.
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SECTION IV

PROPOSAL CONTENT

4.1 Form of Proposal  Form of Proposal, pages 14-15, completed and signed by your Company’s authorized representative.

4.2 Company Profile  Company should provide a brief profile listing company history, business composition (proprietorship, partnership or incorporation), the state under which your business is organized, and any other pertinent information that can be used to evaluate the proposal.  Include as Supplement 1 of your RFP response.

4.3 References  Company is to indicate three (3) references of clients currently using your Social Community Software Solution. List should include client name, address, phone number, email, and client contact. Preferred references will come from universities or clients of a similar size to ISU.  Include as Supplement 2 of your RFP response.

4.4 Proposed Solution  Provide detailed information describing company’s proposed solution to include any and all available and anticipated features and abilities of the system. Provide a description of the software that will operate the proposed solution. Include screen shots or pictures of the system, if possible.  Include as Supplement 3 of your RFP response.

4.5 Specifications  Provide a response to each of the specifications provided in Section II as to whether proposed solution can meet the requirement or not. If the answer is no, please elaborate on what can be done instead or why the specification cannot be met. Any requirement that you cannot meet should be noted in the exceptions document (Attachment A).  Include as Supplement 4 of your RFP response.

4.6 Software Requirements  Specify any hardware or software requirements ISU must meet to utilize your proposed solution.  Include as Supplement 5 of your RFP response.

4.7 Reporting  Provide information on the standard reporting available as well as if any customized reports can be run.  Include as Supplement 6 of your RFP Response.

4.8 Timeline  Provide information describing the steps needed to implement this system solution after award.  ISU desires to have a solution implemented by fall of 2015 June 1, 2016.  Include as Supplement 7 of your RFP response.

4.9 Training  Provide details for the training provided. Indicate if the training can be provided onsite and/or offsite (if offsite, state location of training) optimal and minimal class sizes, training prerequisites, online training, and other training/support related materials available. Describe the training provided for all essential personnel on the use and administration of the proposed system. Include both on and off site training provided. An itemized list of training costs should be included in your proposal, based on total and per-person costs. Indicate the availability of on-site training. Describe the ongoing training necessary to operate the system.  Include as Supplement 8 of your RFP response.
4.10 **Maintenance and Support**  
Describe the general ongoing maintenance and support policy. Company must provide for ongoing maintenance and support for all software. Ongoing maintenance fees should include access to phone, fax, and remote access support. Identify any performance guarantees or standards. Describe the technical support available for administering your system. What are the hours of availability? What type of support is available (Web, email, phone, chat)? What is the expected response time on technical issues? Indicate the availability of support (i.e. 24x7, 9-5 weekday, etc). **Include as Supplement 9 of your RFP response.**

4.11 **Proposal Price**  
Provide an itemized list of all costs associated with the proposed solution including any applicable discounts, and total price proposed to Iowa State University for all proposed software, training, etc. To enable us to easily compare costs between vendors, your proposal should, at a minimum, include the detailed costs for the items shown below. Differentiate one-time costs from annual costs where required. State your pricing structure for software licensing. If different structures exist, please explain.

- Total cost to ISU
- Training costs
- Any on-going or continuous costs
- Maintenance and support for software. Describe fees for any ‘off hours’ support that may be necessary to resolve problems

**Include as Supplement 10 of your RFP response.**
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SECTION V

FORM OF PROPOSAL

5.1 Company has provided all parties involved with a copy of the RFP?
Yes _____  No _____

5.2 Subcontractors   All Parties to the contract, including subcontractors, should be listed below including address along with name and phone number of contract person for each party.

1. __________________________________  3. ______________________________
   __________________________________
   __________________________________
   __________________________________

2. __________________________________  4. ______________________________
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5.3 Proprietary Information   Please list all information or sections that you consider proprietary. Note that pricing and financial arrangements cannot be considered as proprietary information.

The sections of this proposal listed below represent trade secrets or proprietary information.

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5.4 Vendor Information

Legal Business Name: ________________________________

Federal I.D. Number: ________________________________

Official Address: ____________________________________

__________________________________________________________________________

Firm’s State or Foreign Country of Residence ________________________________

Sales contact ____________________________________________

Telephone Number ________________________________

Fax Number______________________________

Email _______________________________________

Authorized Signature ________________________________

Typewritten or Printed Signature __________________________ Date ____________
Please note: Your proposal will be considered incomplete unless the following are included with your offer. Indicate compliance by placing a check mark in the space provided: All Documents should be included IN THE ORDER PROVIDED BELOW.

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<td><strong>Form of Proposal</strong> (pages 14 and 15) completed and signed by your company's authorized official.</td>
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ATTACHMENT A

EXCEPTIONS

Please list any and all exceptions to this RFP in this section. Include page number, section and reason for exception: (Make additional pages if necessary)

Please check one of the following:

[   ] We have no exceptions to this RFP
[   ] We have the following exceptions to this RFP

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</tr>
</tbody>
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