



Purchasing Services

**Request For Proposal
RFP 00/01-20**

**SUPPLY AND INSTALLATION OF AN
ADMINISTRATIVE SOFTWARE SYSTEM**

Issue Date: Friday, March 16, 2001, 9:00 a.m.
Closing Date: Wednesday, April 11, 2001, 4:00 p.m.
All Times Are In Local Time

SUBMITTAL LOCATION

**LANE COMMUNITY COLLEGE
PURCHASING SERVICES DEPARTMENT
4000 EAST 30TH AVENUE
EUGENE OREGON 97405-0640**

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Enclosure:	Mailing Label (one adhesive-backed sheet)	

This package consists of 31 consecutively numbered pages; this is page 1.



Purchasing Services

PART I: Invitation

1) Invitation

Lane Community College of Eugene, Oregon, hereinafter, "**college**," invites proposals from **enterprise-wide administrative software providers** (hereinafter, "proposer," or "company," or "provider" or "contractor") to supply, install and maintain **one Administrative Software System on the Main Campus of Lane Community College located at 4000 East 30th Avenue, Eugene, Oregon** (hereinafter, the project is referred to as the **System**). Interested firms which specialize in the provision of these types of software are invited to submit proposals to accomplish the Scope of Work defined within this invitation.

Lane Community College, a Community College District created within the context of Oregon Revised Statutes, is an Equal Opportunity Employer. **Minority and Women-Owned Businesses are encouraged to participate in this solicitation.**

2) Submittal of Proposals

Interested firms may submit responses to this invitation by completing the requested documentation and submitting it to:

**Lane Community College
Purchasing Services Department
4000 East 30th Avenue
Eugene Oregon 97405**

within a sealed envelope clearly marked with the words:

Response to RFP 00/01-20 Enclosed

not later than the time and date set for submittals shown on Page 1 of this solicitation. ***Please use the enclosed, adhesive-backed, mailing label for this purpose. Delivery is the sole responsibility of the proposer. Proposals not received by the predetermined time on the due date will be returned unopened.***

Lane Community College

Lloyd Rain, Purchasing Director

END OF PART I

the contract documents or completion of the work, whichever is the shorter period and will be activated by Purchase Order.

The contract engagement term may be canceled or terminated by the delivery of a certified letter from the President of the college or delegate, at his or her sole discretion, giving thirty calendar days' notice of intent to cancel. If such notice is promulgated, the notice shall give reason for termination of the contract.

Valid reasons for contract termination, for example, may be for lack of funds, for unacceptable performance of the Contractor, for lapse of required insurance coverage, for lapse of required registrations, or for any other documentable reason. At the end of the thirty day period, if the notice is not rescinded by certified or registered mail from the President or delegate, the contract shall be deemed to have been canceled.

The contract engagement term may be renewed, extended or otherwise changed by **Change Order** or **Notice to Proceed**, whichever is applicable.

Notwithstanding other portions of this agreement, this contract may be terminated if any of the following actions take place:

- i) The Contractor is no longer qualified to perform the work;
- ii) Any suit is filed against the college regarding the Contract or the contractor's performance, which, in the opinion of a neutral third-party attorney, is significant and substantive and has a reasonable likelihood of success;
- iii) The Contractor engages in anti-competitive activities such as blocking competition, displays of favoritism, improper patronage, fiscal impropriety or any other activities which, in the sole judgement of the college, are not in concert with the mission and scope of work stated above;
- iv) Failure to reach agreement on desired changes, additions or deletions.

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PART V: Scope

Supply, install and maintain **one enterprise-wide, fully integrated, Administrative Software System on the Main Campus of Lane Community College located at 4000 East 30th Avenue, Eugene, Oregon.**

1) Primary Systems

The System shall be specifically designed for use in a large higher educational institution and shall include, at a minimum, capabilities for:

- Budgeting & Financial Management
- Enrollment Management
- Human Resource Management
- Instructional Management
- Student Financial Services

2) Other Systems and Issues

The system shall contain and/or provide support for the following:

- Web Functionality
- Research, Analysis & Assessment

Portal Services
Voice Response Systems
Database Management Software

3) Project Inclusions

The work for which the college intends to contract includes:

- Delivery of all software
- Installation of all software, provision of all manuals and other requirements specified
- Technical support for not less than five years
- Warranty that all deliverables operate precisely as proposed in literature, correspondence, proposal, clarifications and other submittals
- Instructional classes for users and programmers during the installation and initiation phases
- Additional training for new users and programmers following application initiation

Note on Web Functions

It should be noted that web-based functions are of paramount importance to the college. The proposer is encouraged to propose all available web-based functionalities and to indicate the system architecture, functional capabilities, availability and price of each.

END OF PART V

PART VI: Product Requirements

The applications desired by the college incorporate the following requirements and functionalities. If these are not part of the proposed software, provide details on future releases which may incorporate the required functionality.

The proposed **administrative information systems**, at a minimum, should support the following functions. If your product(s) provide additional functionality not indicated in this list, include a skeletal listing of them in your response. In the appropriate location (see part VII, paragraph 6 c) state those functions **which are not supported** by the proposed software.

Major System Considerations

Tracking of processes, documents and individuals, and other issues of importance to the college

Notification systems that allow the college to communicate with categories of individuals

Adequate security at the field level

"End to end" automation of processes and sub-processes without embedded manual steps

Monitoring of inter-connected processes with automated updating of appropriate fields (example: canceling future disbursements when a student is disqualified, in default or owing a repayment, or prohibiting registration when account is not current)

Archiving and records management

On-line access to multiple years of data for individuals

Budgeting & Financial Management

General Ledger

- Account number structure
- Chart of Accounts
- Subsidiary Ledgers
- Secure transaction processing
- Auto balance for interfund transactions

Budgeting

- Budget development
- Budget document with prior three years' expenditures

Departmental Budgeting

Fixed Assets

- Depreciation calculation and posting

Financial Reporting

- Departmental reports
- Management information
- Query and reporting tools (save queries)
- Auto exception reports
- Audit report (GASB & FASB compliant)

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Enrollment Management

General

- User-friendly integrated databases, providing for fast and consistent processing
- Web interfacing for students, staff, faculty
- Tracking system capabilities
- Letter/email and mailing label generation
- Multiple address fields
- Duplicate ID/Name management feature
- Upload/download interface with mainframe and individual user desktop software
- Catalog management: courses/sections/times offered, etcetera

Admissions

- Flexible automated support for student data entry, management, retrieval
- International admissions/INS reporting

Registration & Records Maintenance

- Registration holds management capabilities
- Registration for multiple terms, preferably four terms in advance
- Manual registration capabilities
- Automated academic standing monitoring

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Human Resource Management

Recruitment/Applicant Tracking

- Affirmative Action voluntary reporting of applicants by posting

Personnel Information Administration

Name and address data
Tax status/exemption
AA/EEO coding and tracking
Non-Resident Alien coding & tracking

Position Management

Budget interface/reconciliation

Benefits Administration

Section 125 plans
403(b)/457 plans (deduction by either percentage or dollar amount)
Pension Administration
State of Oregon new hire reporting
Charitable contributions



Instructional Management

The following types of data and processes are needed for instructional management and should be accessible by web or smart screens. Data relating to budgets, finance, personnel, classes, students, and employees should be extractable by department-level users based on department and date for use in spreadsheets and databases.

Registration

Alternate address fields for sponsored students
Permanent address fields for international student's home country address
Simplified student record and registration process for events

Scheduling & Class Building

Class and event scheduling with ability to customize
Scheduling of noncontiguous classes
Scheduling of courses that span more than one term
Alert for room conflicts during class building process
Hunt for open rooms according to class time and size
Room scheduling and searching
Reporting on classroom conflicts
Room usage tracking by campus, building, and room

Enrollment Management

TOPS reporting capacity
Tracking of testing and student progress
Track student wait lists
Customizable beginning registration date for special events

Department Budgeting and Finances

Budget reporting by department or other query, and date
On-line budget changes
On-line access to department financial reports



Student Financial Services

Funds, balances and program management

Cross-referencing data within system for checks and balances
Electronic "audit trail" for key data element changes
Online tools that support staff efficiency and effectiveness
Tools for producing ad hoc and routine reports
User controlled automated edits of historical data
Support for consortium and dual enrollment agreements

Automated support for all institutional and federal financial aid processes and sub-processes including:

Post-screening ISIR monitoring and review

Adaptability to unique institutional characteristics and requirements and flexibility in adapting software to best fit the institutional preferred processing sequence (e.g. verification before or after awarding)

Capacity for calculating eligibility on a term by term basis for students with variable enrollment levels and periods of enrollment areas such as student budgets, awards, and satisfactory academic progress

Flexible automated support for student accounts receivable maintenance including:

Automatic generation of specific charges through registration and other activity

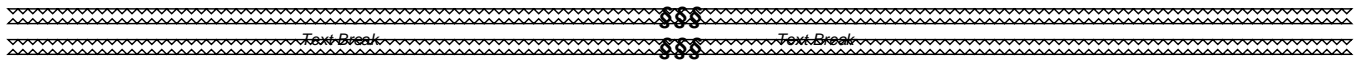
Ease of interfacing with external charge generating systems, (e.g. Bookstore, Library, Flight Tech)

Capacity to identify single or multiple third party or "responsible party" payers of a student's account and to store sponsor(s) demographic information

Support for a flexible credit policy; e.g. credit vs. cash-only students, minimum balance, current or non-current account status.

Flexible handling of billing, payments, credit balances and refunds

Support for past-due account collection functions, including user controlled aging, automated generation of finance and "handling" charges

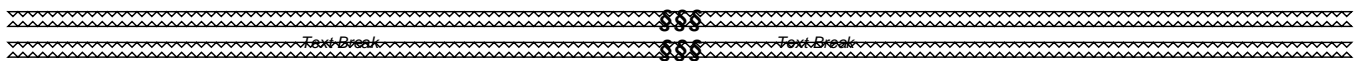


Other Systems & Issues

1) Web Functionality

a) Specific Tasks

- | | |
|---|---|
| Academic standing verification | Financial aid status/award information |
| Admission application functionality | Registration |
| Class/section availability: current/future term | Schedule printing |
| Course catalog access | Schedule/class/section/grading option changes |
| Degree audit, degree completion progress | Update addresses |
| Demographic information management by user | Variable format transcript reporting |
| Employee leave record entry | Updating |
| Employee time sheet entry | Editable on-screen reports |
| Faculty access to class lists/registration counts | Batch processing |
| Student account balance and status | Institutional effectiveness |



PART VII: PROPOSAL CONTENT AND ANALYSIS

1) Proposal Analysis Process

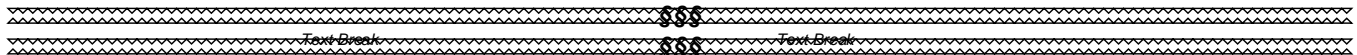
Proposals shall be analyzed on the following basis:

- a) Proposals will be read by the members of the review committee. Proposals will be divided into two groups, those which are considered responsive and responsible, and those which are not. Those which are not will be withdrawn from consideration.

Note: **Responsive** means that the proposal has complied with all the requirements of this invitation; **Responsible** means that the proposer has been truthful, that pertinent negative information has not been withheld, that the proposal is not a sham, that the proposer and named staff are qualified as specified, that the proposer is adequately financially sound for a reasonable expectation of completion of the work, and that the proposer, in the judgement of the college, is capable of performing the work.

During the above evaluations all proposals will be ranked on a "pass/fail" basis. The primary factors which will be considered include the proposer's:

- i) Clear understanding of the work to be performed, demonstrated by the comprehensiveness and appropriateness of the proposal
- ii) Ability to undertake a contract of the size indicated, demonstrated by the size, organizational structure and financial soundness of the firm
- iii) Specific technical experience of the firm and *specific prior experience* for large governmental, municipal and post-secondary educational organizations
- iv) Qualifications of staff



9) Mandatory Submittals

Submit each proposal in ONE loose leaf binder with clear divisions between each section. Identify each section, as defined below, with a tab.

The proposer shall submit, directly following the **transmittal letter**:

- Attachment B, Proposal Form**
- Attachment C, Pricing Form**
- Technology Proposal**
- Products (Applications/Modules/Training/Services to be Supplied)**
- Services (Services, Assistancess and Training to be Supplied)**
- Work Plan Definition**
- Contribution Expectations**
- References**
- Deliverables (bill of materials)**
- Hardware Proposal**
- Proposer's Qualifications and Management Organization**
- Comments on College Terms & Conditions**
- Proposed Contract and Warranty**
- Product Information**

**Attachment A !! RFP 00/01-20
Administrative Software System**

Typical Analysis Sheet

NAME OF PROPOSER _____	ANALYZED BY _____	DATE _____
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1) Responsiveness (Comment on each item)

Cover Letter _____
 Proposal Forms _____
 Attachments _____

If proposal is non-responsive state reason and proceed no further with analysis.

2) Responsibleness (comment on Responsibleness as defined herein)

If proposal is not responsible state reason and proceed no further with analysis.

3) Price Acceptability (comment on acceptability of proposed prices, fees and other costs.)

If prices do not represent reasonable value proceed no further with analysis.

4) Ratings & Scoring A maximum of ten points will be assigned to each category by each scorer.

		Score	Weight	Final Score
a)	Company	{ }	1	{ }
b)	Services	{ }	2	{ }
c)	Total Cost of Ownership	{ }	3	{ }
d)	User Interfaces	{ }	3	{ }
e)	Technology	{ }	4	{ }
f)	Functionality	{ }	5	{ }

Total Proposal Score ----->

Adjusted Total Five Year Cost (Attachment C) ----->

5) Comments on Proposal, Costs, References, Functions, Services and other related issues

**Attachment B !! RFP 00/01-20 !! (Page 1 of 3)
Administrative Software System**

Proposal Form

The proposer makes the following statements and representations as part of the proposal:

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Attachment B !! RFP 00/01-20 !! Administrative Software System !! (Page 2 of 3)

Proposal Form

GENERAL INFORMATION

- 1) If a corporation, list the date, state and type of incorporation.

- 2) If a partnership list names of all partners and declare which have general or limited status.

- 3) Has the proposer ever had a license or permit revoked or suspended or sustained any form of bankruptcy during the last ten years? If yes, describe action and outcome.

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SIGNATURE BLOCK

Company Name:

Signer's Mailing Address:

Signer's City/State/Zip:

Signer's Telephone Number:

Signer's Facsimile Number:

Signer's Name (Printed):

Signer's Title:

Signature: **Date:**

Attachment C !! RFP 00/01-20 !! Administrative Software System

Proposal Form

PRICING INFORMATION

Use attachments in same format as this block if additional space is required.

* Include all deliverables such as applications, database management systems, voice systems, web systems, subcontracted systems (from other suppliers), services (describe in response, state hours & locations, estimated travel expenses), etcetera.

Application, Module, System or Function Name *	Original License Fee	Annual Maintenance Fees **				
		Year 1	Year 2	Year 3	Year 4	Year 5
*** Total of each column----->						

** If purchase is initiated on July 1, 2001, when is the "Year 1" Maintenance Fee due and payable?

*** **Total Five-Year Cost** (Sum of Fees and Five Year Maintenance Costs)
(I.e., sum of all totals on bottom line of chart directly above)

Attachment D !! RFP 00/01-20
Typical Analysis Sheet
 Page 1 of 2

NAME OF PROPOSER _____	ANALYZED BY _____	DATE _____
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Technical Analysis

Rating Values: 5 = Exceptional; 4 = Above Average; 3 = Acceptable; 2 = Questionable, 1 = Unacceptable.

- C = Comprehensiveness (completeness of function)
- D = Degree of integration with other functions and modules
- E = Ease of use (intuitiveness, screen design, GUI similarity of web functionality, etc.)

Technical Scoring Chart

System, Module or Attribute	Proposal			Site Visit #1			Site Visit #2			Site Visit #3			References			Total
	C	D	E	C	D	E	C	D	E	C	D	E	C	D	E	

Total Technical Score ----->

Box 1

Box 1 ÷ Number of Line Items ----->

Box 2

Box 2 ÷ 100 X 5 ----->

Box 3

Insert score from lower box into Category K "Score" on page 1

Note to scorer: On back of sheet write summary of strongest and weakest attributes /characteristics.