

THE UNIVERSITY OF RHODE ISLAND

Solicitation Information

4/22/2024

RFP# 101372

TITLE: ONE CARD SOLUTION

Submission Deadline: 05/20/2024 12:00 PM (Eastern Time)

PRE-BID/ PROPOSAL CONFERENCE: NO

MANDATORY:

If YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents.

DATE:

LOCATION:

Questions concerning this solicitation must be received by the URI Purchasing Department at URIPurchasing@uri.edu no later than **5/1/2024 12:00 PM(EST)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

BID SURETY BOND REQUIRED: NO

PAYMENT AND PERFORMANCE BOND REQUIRED: NO

CAMELY MACHADO, Assistant Director of Purchasing/if

Note to Applicants:

- Applicants should register on-line at the URI Controller's Website at <https://web.uri.edu/controller/accounts-payable/suppliers/>
- Proposals received without a completed URI Bidder Certification Form may result in disqualification.

Respondent Information:

Company Name _____

Address _____

Contact Name _____

Contact Email _____:

Contact Phone _____

University of Rhode Island Bidder Certification Form
Board of Trustees Procurement Regulations

ALL OFFERS ARE SUBJECT TO THE REQUIREMENTS, PROVISIONS AND PROCEDURES CONTAINED IN THIS CERTIFICATION FORM. Offerors are expected to read, sign and comply with all requirements. Failure to do so may be grounds for disqualification of the offer contained herein.

Rules for Submitting Offers

This Certification Form must be attached in its entirety to the front of the offer and shall be considered an integral part of each offer made by a vendor to enter into a contract with the University of Rhode Island. As such, submittal of the entire Bidder Certification Form, signed by a duly authorized representative of the offeror attesting that he/she (1) has read and agrees to comply with the requirements set forth herein and (2) to the accuracy of the information provided and the offer extended, is a mandatory part of any contract award.

To assure that offers are considered on time, each offer must be submitted with the specific Bid/RFP/LOI number, date and time of opening marked in the upper left hand corner of the envelope. Each bid/offer must be submitted in separate sealed envelopes.

A complete signed (in ink) offer package must be delivered to the University of Rhode Island Purchasing Office by the time and date specified for the opening of responses in a sealed envelope.

Bid responses must be submitted on the URI bid solicitation forms provided, indicating brand and part numbers of items offered, as appropriate. Bidders must submit detailed cuts and specs on items offered as equivalent to brands requested WITH THE OFFER. Bidders must be able to submit samples if requested.

Documents misdirected to other State or University locations or which are not present in the University of Rhode Island Purchasing Office at the time of opening for whatever cause will be deemed to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the University of Rhode Island Purchasing Office. Postmarks shall not be considered proof of timely submission.

RIVIP SOLICITATIONS. To assure maximum access opportunities for users, public bid solicitations shall be posted on the RIVIP for a minimum of seven days and no amendments shall be made within the last five days before the date an offer is due. Except when access to the Web Site has been severely curtailed and it is determined by the Purchasing Agent that special circumstances preclude extending a solicitation due date, requests to mail or fax hard copies of solicitations will not be honored.

PRICING. Offers are irrevocable for sixty (60) days from the opening date (or such other extended period set forth in the solicitation), and may not be withdrawn, except with the express permission of the University Purchasing Agent. All pricing will be considered to be firm and fixed unless otherwise indicated. The University of Rhode Island is exempt from Federal excise taxes and State Sales and Use Taxes. Such taxes shall not be included in the bid price.

ALL PRICES QUOTED ARE FOB DESTINATION.

DELIVERY and PRODUCT QUALITY. All offers must define delivery dates for all items; if no delivery date is specified, it is assumed that immediate delivery from stock will be made. The contractor will be responsible for delivery of materials in first class condition. Rejected materials will be at the vendor's expense.

PREVAILING WAGE, OSHA SAFETY TRAINING and APPRENTICESHIP REQUIREMENTS. Bidders must comply with the provisions of the Rhode Island labor laws, including R.I. Gen. Laws §§ 37-13-1 et seq. and occupational safety laws, including R.I. Gen. Laws §§ 28-20-1 et seq. These laws mandate for public works construction projects the payment of prevailing wage rates, the implementation and maintenance of occupational safety standards, and for projects with a minimum value of \$1 Million, the employment of apprentices. The successful Bidder must submit certifications of compliance with these laws from each of its subcontractors prior to their commencement of any work. Prevailing wage rates, apprenticeship requirements, and other workforce and safety regulations are accessible at www.dlt.ri.gov.

PUBLIC RECORDS. Offerors are advised that all materials submitted to the University for consideration in response to this solicitation will be considered without exception to be Public Records pursuant to Title 38 Chapter 2 of the Rhode Island General Laws, and will be released for inspection immediately upon request once an award has been made. Offerors are encouraged to attend public bid/RFP openings to obtain information; however, bid/RFP response summaries may be reviewed after award(s) have been made by visiting the Rhode Island Vendor Information Program (RIVIP) at www.purchasing.ri.gov > Solicitation Opportunities > Other Solicitation Opportunities. Telephone requests for results will not be honored. Written requests for results will only be honored if the information is not available on the RIVIP.

Award will be made to the responsive and responsible offeror quoting the lowest net price in accordance with specifications, for any individual item(s), for major groupings of items, or for all items listed, at the University's sole option.

BID SURETY. Where bid surety is required, bidder must furnish a bid bond or certified check for 5% of the bid total with the bid, or for such other amount as may be specified. Bids submitted without a required bid surety will not be considered.

SPECIFICATIONS. Unless specified “no substitute”, product offerings equivalent in quality and performance will be considered (at the sole option of the University) on the condition that the offer is accompanied by detailed product specifications. Offers which fail to include alternate specifications may be deemed nonresponsive.

VENDOR AUTHORIZATION TO PROCEED. When a purchase order, change order, contract/agreement or contract/agreement amendment is issued by the University of Rhode Island, no claim for payment for services rendered or goods delivered contrary to or in excess of the contract terms and scope shall be considered valid unless the vendor has obtained a written change order or contract amendment issued by the University of Rhode Island Purchasing Office PRIOR to delivery.

Any offer, whether in response to a solicitation for proposals or bids, or made without a solicitation, which is accepted in the form of an order OR pricing agreement made in writing by the University of Rhode Island Purchasing Office, shall be considered a binding contract.

REGULATIONS, GENERAL TERMS AND CONDITIONS GOVERNING STATE AND THE UNIVERSITY OF RHODE ISLAND CONTRACTS. This solicitation and any contract or purchase order arising from it are issued in accordance with the specific requirements described herein, and the State’s [Purchasing Laws](#) and the [URI Board of Trustees Regulations and General Terms and Conditions of Purchase](#).

EQUAL EMPLOYMENT OPPORTUNITY. Compliance certificate and agreement procedures will apply to all awards for supplies or services valued at \$10,000 or more. Minority Business Enterprise policies and procedures, including subcontracting opportunities as described in Title 37 Chapter 14.1 of the Rhode Island General Laws also apply.

PERFORMANCE BONDS. Where indicated, successful bidder must furnish a 100% performance bond and labor and payment bond for contracts subject to Title 37 Chapters 12 and 13 of the Rhode Island General Laws. All bonds must be furnished by a surety company authorized to conduct business in the State of Rhode Island. Performance bonds must be submitted within 21 calendar days of the issuance of a tentative notice of award.

DEFAULT and NON-COMPLIANCE Default and/or non-compliance with the requirements and any other aspects of the award may result in withholding of payment(s), contract termination, debarment, suspension, or any other remedy necessary that is in the best interest of the state/University of Rhode Island.

COMPLIANCE Vendor must comply with all applicable federal, state and local laws, regulations and ordinances.

SPRINKLER IMPAIRMENT AND HOT WORK. The Contractor agrees to comply with the practices of the State’s Insurance carrier for sprinkler impairment and hot work. Prior to performing any work, the Contractor shall obtain the necessary information for compliance from the Risk Management Office at the Department of Administration or the Risk Management Office at the University of Rhode Island.

Each bid proposal for a *public works project* must include a “public copy” to be available for public inspection upon the opening of bids. **Bid Proposals that do not include a copy for public inspection will be deemed nonresponsive.**

For further information on how to comply with this statutory requirement, see [R.I. Gen. Laws §§ 37-2-18\(b\) and \(j\)](#). Also see State of Rhode Island Procurement Regulation 5.11 at : <https://ridop.ri.gov/about-us/procurement-statutes-and-regulations>

SECTION 2 – DISCLOSURES

ALL CONTRACT AWARDS ARE SUBJECT TO THE FOLLOWING DISCLOSURES & CERTIFICATIONS

Offerors must respond to every disclosure statement. A person authorized to enter into contracts must sign the offer and attest to the accuracy of all statements.

Indicate Yes (Y) or No (N):

____ 1 State whether your company, or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has been subject to suspension or debarment by any federal, state, or municipal government agency, or the subject of criminal prosecution, or convicted of a criminal offense with the previous five (5) years. If Yes, then provide details below.

____ 2 State whether your company, or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has had any contracts with a federal, state or municipal government agency terminated for any reason within the previous five (5) years. If Yes, then provide details below.

____ 3 State whether your company or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has been fined more than \$5000 for violation(s) of Rhode Island environmental laws by the Rhode Island Department of Environmental Management within the previous five (5) years. If Yes, then provide details below.

____ 4 State whether any officer, director, manager, stockholder, member, partner, or other owner or principal of the Bidder is serving or has served within the past two calendar years as either an appointed or elected official of any state governmental authority or quasi-public corporation, including without limitation, any entity created as a legislative body or public or state agency by the general assembly or constitution of this state. If Yes, then provide details below.

IF YOU HAVE ANSWERED “YES” TO QUESTIONS #1 – 4 PROVIDE DETAILS/EXPLANATION IN AN ATTACHED STATEMENT. INCOMPLETE CERTIFICATION FORMS SHALL BE GROUNDS FOR DISQUALIFICATION OF OFFER.

SECTION 3 - OWNERSHIP DISCLOSURE

Vendors must provide all relevant information. Bid proposals submitted without a complete response may be deemed nonresponsive.

If the vendor is privately held, the vendor shall provide ownership information below.

List each officer, director, manager, stockholder, member, partner, or other owner or principle of the Bidder, and each intermediate parent company and the ultimate parent company of the Bidder. For each individual, provide his or her name, business address, principal occupation, position with the Vendor, and the percentage of ownership, if any, he or she holds in the Vendor, and each intermediate parent company and the ultimate parent company of the Vendor.

If the company is publicly held, the vendor may provide owner information about only those stockholders, members, partners, or other owners that hold at least 10% of the record or beneficial equity interests of the vendor; otherwise, complete ownership disclosure is required.

SECTION 4 - CERTIFICATIONS

Bidders must respond to every statement. Bid proposals submitted without a complete response may be deemed nonresponsive.

Indicate "Y" (Yes) or "N" (No), and if "No," provide details below.

THE VENDOR CERTIFIES THAT:

____ 1 I/we certify that I/we will immediately disclose, in writing, to the University Purchasing Agent any potential conflict of interest which may occur during the course of the engagement authorized pursuant to this contract.

____ 2 I/we acknowledge that, in accordance with (1) Chapter §37-2-54(c) of the Rhode Island General Laws "no purchase or contract shall be binding on the state or any agency thereof unless approved by the Department [of Administration] or made under general regulations which the Chief Purchasing Officer may prescribe," and (2) RIGL section §37-2-7(16) which identifies the URI Board of Trustees as a public agency and gives binding contractual authority to the University Purchasing Agent, including change orders and other types of contracts and under State Purchasing Regulation 8.2.B any alleged oral agreement or arrangements made by a bidder or contractor with any agency or an employee of the University of Rhode Island may be disregarded and shall not be binding on the University of Rhode Island.

____ 3 I/we certify that I or my/our firm possesses all licenses required by Federal and State laws and regulations as they pertain to the requirements of the solicitation and offer made herein and shall maintain such required license(s) during the entire course of the contract resulting from the offer contained herein and, should my/our license lapse or be suspended, I/we shall immediately inform the University of Rhode Island Purchasing Agent in writing of such circumstance.

____ 4 I/we certify that I/we will maintain required insurance during the entire course of the contract resulting from the offer contained herein and, should my/our insurance lapse or be suspended, I/we shall immediately inform the University of Rhode Island Purchasing Agent in writing of such circumstance.

____ 5 I/we certify that I/we understand that falsification of any information herein or failure to notify the University of Rhode Island Purchasing Agent as certified herein may be grounds for suspension, debarment and/or prosecution for fraud.

____ 6 I/we acknowledge that the provisions and procedures set forth in this form apply to any contract arising from this offer.

____ 7 I/we acknowledge that I/we understand the State's Purchasing Laws ([§37-2 of the General Laws of Rhode Island](#)) and the [URI Board of Trustees Regulations](#) apply as the governing conditions for any contract or purchase order I/we may receive from the University of Rhode Island, including the offer contained herein.

____ 8 I/we certify that the bidder: (i) is not identified on the General Treasurer's list, created pursuant to R.I. Gen. Laws § 37-2.5-3, as a person or entity engaging in investment activities in Iran described in § 37-2.5-2(b); and (ii) is not engaging in any such investment activities in Iran.

____ 9 If the product is subject to Department of Commerce Export Administration Regulations (EAR) or International Traffic in Arms Regulations (ITAR), please provide the Export Control Classification Number (ECCN) or the US Munitions List (USML)
Category: _____

____ 10 I/we certify that the above information is correct and complete.

IF YOU ARE UNABLE TO CERTIFY YES TO QUESTIONS #1 – 8 and 10 OF THE FOREGOING, PROVIDE DETAILS/EXPLANATION IN AN ATTACHED STATEMENT. INCOMPLETE CERTIFICATION FORMS SHALL BE GROUNDS FOR DISQUALIFICATION OF OFFER.

Signature below commits vendor to the attached offer and certifies (1) that the offer has taken into account all solicitation amendments where applicable, (2) that the above statements and information are accurate and that vendor understands and has complied with the requirements set forth herein.

Vendor/Company Name; _____

Vendor's Signature: _____ Bid Number: _____ Date: _____
(Person Authorized to enter into contracts; signature must be in ink) (if applicable)

Print Name and Title of Company official signing offer

SECTION 1: INTRODUCTION

The University of Rhode Island Board of Trustees /University of Rhode Island is soliciting proposals for One Card Solution from qualified OFFERORS to provide a solution that is flexible, encourages cost savings, is environmentally conscious, and includes a range of new industry standards, processes, efficiencies, services, integrations, and support in accordance with the terms of this Request for Proposal (“RFP”) and General Terms and Conditions of Purchase indicated on the attached Bidder Certification Form.

The initial contract period will begin approximately January 1, 2025, for 5 year(s). Contracts may be renewed for up to 5 additional 12-month periods based on vendor performance and the availability of funds.

This is a Request for Proposals, not a Request for Quotes. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to cost; there will be no public opening and reading of responses received by the University of Rhode Island Purchasing Department pursuant to this solicitation, other than to name those offerors who have submitted proposals.

Instructions and Notifications to Offerors

1. Potential offerors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFP are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP may be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP or for providing oral or written clarification of its content shall be borne by the vendor. The University assumes no responsibility for these costs even if the RFP is canceled or continued.
4. Proposals are considered to be irrevocable for a period of not less than 180 days following the opening date, and may not be withdrawn, except with the express written permission of the University of Rhode Island Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated in the proposal.
6. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Subcontracts are permitted, provided that their use is clearly indicated in the vendor’s proposal, and the subcontractor(s) to be used is identified in the proposal.
7. The purchase of goods and/or services under an award made pursuant to this RFP will be contingent on the availability of appropriated funds.
8. Vendors are advised that all materials submitted to the University of Rhode Island Purchasing

Department for consideration in response to this RFP may be considered to be public records, as defined in R. I. Gen. Laws § 38-2-1, *et seq.*, and may be released for inspection upon request, once an award has been made.

Any information submitted in response to this RFP that a vendor believes are trade secrets or commercial or financial information which is of a privileged or confidential nature should be clearly marked as such. The vendor should provide a brief explanation as to why each portion of information that is marked should be withheld from public disclosure. Vendors are advised that the University of Rhode Island Purchasing Department may release records marked confidential by a vendor upon a public records request if the University determines the marked information does not fall within the category of trade secrets or commercial or financial information which is of a privileged or confidential nature. Vendors are also advised that responses marked confidential in their entirety may be deemed non-responsive. **Inclusion of a “confidentiality header/footer” on entire pages of submissions (or all pages) is NOT considered an acceptable way to flag confidential information (flags must be very specific and a specific justification explaining how the information meets the APRA exception must be provided with it) and will not be recognized by URI.**

9. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
10. By submission of proposals in response to this RFP vendors agree to comply with R. I. General Laws § 28-5.1-10 which mandates that contractors/subcontractors doing business with the State of Rhode Island exercise the same commitment to equal opportunity as prevails under Federal contracts controlled by Federal Executive Orders 11246, 11625 and 11375.

Vendors are required to ensure that they, and any subcontractors awarded a subcontract under this RFP, undertake or continue programs to ensure that minority group members, women, and persons with disabilities are afforded equal employment opportunities without discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability.

Vendors and subcontractors who do more than \$10,000 in government business in one year are prohibited from engaging in employment discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability, and are required to submit an “Affirmative Action Policy Statement.”

Vendors with 50 or more employees and \$50,000 or more in government contracts must prepare a written “Affirmative Action Plan” prior to issuance of a purchase order.

- a. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation.
- b. Vendors further agree, where applicable, to complete the “Contract Compliance Report” (as well as the “Certificate of Compliance”) <https://dedi.ri.gov/divisions-units/equal-opportunity-office/contract-compliance-related-forms> and submit both documents, along with their Affirmative Action Plan or an Affirmative Action Policy Statement, prior to issuance of a purchase order. For public works projects vendors and all subcontractors must submit a “Monthly Utilization Report” to the ODEO/State

Equal Opportunity Office, which identifies the workforce actually utilized on the project.

For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via e-mail at <https://dedi.ri.gov/divisions-units/equal-opportunity-office> .

11. In accordance with R. I. Gen. Laws § 7-1.2-1401 no foreign corporation has the right to transact business in Rhode Island until it has procured a certificate of authority so to do from the Secretary of State. This is a requirement only of the successful vendor(s). For further information, contact the Secretary of State at (401-222-3040).
12. In accordance with R. I. Gen. Laws §§ 37-14.1-1 and 37-2.2-1 it is the policy of the State to support the fullest possible participation of firms owned and controlled by minorities (MBEs) and women (WBEs) and to support the fullest possible participation of small disadvantaged businesses owned and controlled by persons with disabilities (Disability Business Enterprises a/k/a “DisBE”)(collectively, MBEs, WBEs, and DisBEs are referred to herein as ISBEs) in the performance of State procurements and projects. As part of the evaluation process, vendors will be scored and receive points based upon their proposed ISBE utilization rate in accordance with 150-RICR-90-10-1, “Regulations Governing Participation by Small Business Enterprises in State Purchases of Goods and Services and Public Works Projects”. As a condition of contract award vendors shall agree to meet or exceed their proposed ISBE utilization rate and that the rate shall apply to the total contract price, inclusive of all modifications and amendments. Vendors shall submit their ISBE participation rate on the enclosed form entitled “MBE, WBE and/or DisBE Plan Form”, which shall be submitted in a separate, sealed envelope as part of the proposal. ISBE participation credit will only be granted for ISBEs that are duly certified as MBEs or WBEs by the State of Rhode Island, Department of Administration, Office of Diversity, Equity and Opportunity or firms certified as DisBEs by the Governor’s Commission on Disabilities. The current directory of firms certified as MBEs or WBEs may be accessed at <https://dedi.ri.gov/divisions-units/minority-business-enterprise-compliance-office> . Information regarding DisBEs may be accessed at www.gcd.ri.gov.

For further information, visit the Office of Equity, Diversity and Inclusion’s website, at <https://dedi.ri.gov/> and see R.I. Gen. Laws Ch. 37-14.1, R.I. Gen. Laws Ch. 37-2.2, and 150-RICR-90-10-1.

13. N/A
14. N/A
15. N/A
16. N/A
17. N/A
18. Complete a Higher Education Community Vendor Assessment Toolkit (HECVAT) [Full, Lite, On-premise] assessment: The [Full, Lite, On-premise] HECVAT, published <https://library.educause.edu/resources/2020/4/higher-education-community-vendor-assessment-toolkit>, needs to be completed by each vendor. The “HECVAT” is intended to simplify and speed up the process of gathering the information to assess the controls used by your organization to protect the University’s data, comply with the terms of the Agreement

and to provide an operationally stable, protected and recoverable service. The completed copy of the HECVAT, provided with your RFP response, will be reviewed and approved for compliance by the Chief Information Security Officer (CISO) prior to the Technical Review. HECVATs not approved by the URI CISO will not proceed to the Technical Review.

19. Vendor agrees to secure the confidentiality of all information and records by applicable federal and state laws, rules, and regulations. Vendor understands that the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g governs the privacy and security of educational records and information and agrees to abide by FERPA rules and regulations, as applicable.

Restrictions on Communications – No Bidder-initiated contact, other than normal business activities not associated with this procurement, will be allowed after the issuance of this RFP between Bidders and University employees or their agents regarding this solicitation, except with express permission of the University Purchasing Department. Any such other contact may be considered improper and may disqualify a Bidder from further consideration. The appropriate channel to direct any communications, concerns or questions regarding the RFP is through the email address provided herein.

If a Bidder fails to notify the University of Rhode Island Purchasing Department contact person of an error in this RFP which was known or reasonably should have been known to the Bidder, the Bidder shall submit a response at the Bidder's own risk. If awarded the contract, the Bidder shall not be entitled to additional compensation or performance time by reason of the error or its later correction.

SECTION 2: BACKGROUND

The University of Rhode Island (URI) Dining Services is seeking proposals for real time comprehensive Campus One Card Solution. URI currently has just over 17,000 undergraduate and graduate students. There are 3920 faculty and staff working on and off campus. URI has a few locations; the main Kingston Campus, a satellite campus on Narragansett Bay and the Nursing Education Center. Instant ID, our current ID card system, relies on barcodes and magnetic stripes. The card is currently used within Dining Services, Housing & Residential Life, Public Safety, Campus Recreation, Library Services, Grubhub, and Ugyrd Merchants. Identification Badges for EMS, Public Safety, and Health Services are also produced. The cards are used to access locks, make purchases with various tenders, and the barcode is used at our Library. The ID photo is distributed to various departments and systems around our campus.

The campus community utilizes the current card solution for meal swipes, dining dollars (funds provided in meal plans other than meal swipes), Ram Account (declining debit account loaded via one of the four (4) kiosks located on campus, online, or over the phone/in person in the Campus ID & Dining Office) to make purchases from on-campus and off-campus merchants.

The University currently uses the CBORD GET online platform where students load money to their accounts, view activity, and freeze cards if lost/stolen. The University's cards are produced using Entrust Instant ID software and DataCard CD800 ID printers.

Persona Campus Online (PCO) is used to provide card access. Our current Campus Card solution, CBORD Odyssey Direct, interfaces with PCO via a flat file. Odyssey Direct also integrates with Peoplesoft student and financial information systems as well, via flat file. These integrations allow for the ability to select, change, and track meal plan information on all 7200 individuals during the academic year 2023/2024.

The University is using a 3rd Party Site to sign up and manage meal plans. Then the Campus ID & Dining Office needs to manually change all meal plans with a change request in Peoplesoft and Odyssey.

Odyssey Direct also integrates with our bookstore vendor, MBS Books.

There have been approximately 20,000 ID cards distributed to faculty, staff, and students every 2 years. Participating off-campus merchants accepting Ram Account processed approximately 80,136 transactions, yielding roughly \$857, 171.00 in net sales during FY23. Similarly, on-campus vendors generated approximately \$6,823,927.00 in Dining Dollars with 1,140,510 total transactions in FY23.

There are currently 26 snack vending machines and 44 drink vending machines across campus with cellular card readers on each machine which allow for the Ram Account to be used as a payment method. Coca-Cola is our current pouring rights supplier (contract expires 7/2024) and Prestige FoodService handles vending for them. Oracle Micros Symphony 2.0 Point of Sale systems accept both credit and debit cards and are integrated with Odyssey Direct.

Access to our two Dining Halls, Hope Mainfare & Butterfield Dining Hall is granted via Morpho Wave Biometric Readers.

The University of Rhode Island is dedicated to providing students with robust campus technology solutions to enhance the on-campus and off-campus experience.

SECTION 3: SCOPE OF WORK AND REQUIREMENTS

INTRODUCTION

The Request for Proposal aims to solicit proposals for a One Card Cloud solution that is flexible, encourages cost savings, is environmentally conscious, and includes a range of new industry standards, processes, efficiencies, services, integrations, and support. The One Card solution must complement the University's goal of implementing robust campus technology solutions to enhance the on-campus experience for students and staff.

This Request for Proposal hereafter referred to as "RFP," provides interested firms with the information required to prepare and submit to the University of Rhode Island sealed proposals for a comprehensive campus one-card solution.

This RFP shall result in a single award. The selected vendor will be responsible for supplying hardware (if necessary) and system software that meets the technical requirements of the University of Rhode Island Dining Services, Housing & Residential Life, Public Safety, Central IT, IT Security, and the URI Campus ID & Dining Office. Also, optional services and products that might benefit the University will be considered.

The successful vendor shall be awarded the contract to provide all services outlined within this RFP for five (5) consecutive years from the date of the fully executed contract. The University of Rhode Island reserves the right to terminate a contract at any time with ninety-day written notices.

DEFINITIONS

SAIT: Student Affairs Information Technology, the main IT Unit for the University of Rhode Island, Division of Student Affairs. SAIT is responsible for the Division's IT infrastructure, IT security, enterprise system functions, and coordinating integrations.

StarRez: StarRez is the Housing Management system used by University of Rhode Island Housing & Residential Life

AZURE: University of Rhode Island uses the AZURE cloud services offered by Microsoft.

Peoplesoft: The University of Rhode Island uses Oracle Peoplesoft as the Student Information System (SIS). URI will transition to Workday over the next decade.

CURRENT ENVIRONMENT

The current Campus Card system has approximately 20,000 Active Cardholders. Current Card System

- Entrust Instant ID
- 2 Data Card CD800 Printers (Production & Spare) (No NFC Module)
- 1 Logitech Brio Camera
- Campus Card Solution: CBORD Odyssey Direct
- Odyssey Direct provides a flat file to Persona Campus Online & The Housing Director software to update card access.
- The URI Bookstore uses MBS and interfaces with Odyssey Direct.
- Coca-Cola (Prestige Food Service) has the campus pouring rights contract (expires 7/2024).
- Moving to StarRez from The Housing Director (THD)
- Oracle Micros Symphony 2 is our point-of-sale system.
- Use CBORD Odyssey Direct automation to import customer/patron information to create ID's.
- Student Information system is PeopleSoft (migrating to Workday Student)

Specific Activities / Tasks

The successful purveyor will provide all equipment, software, licenses, on-site installation, integration with the university systems, and training required to perform the deliverables outlined in this RFP. Bid submissions should include responses demonstrating the purveyor's ability to meet each of the following Deliverables:

1. “Campus Card” where our constituents only need one official card or Mobile credential for all functions. These functions include, but are not limited to:

a. Identification

- i. Vending
- ii. Point of Sale (Oracle Micros Symphony 2)
- iii. Meal Plan Administration
- iv. Printing/Copying (Pharos)
- v. Attendance Tracking
- vi. Event Access
- vii. Laundry (Automatic Laundry)
- viii. Biometrics (Morpho Wave)

- 2. Provides a simple, expedited process for Campus Card production.
- 3. Meets all needs outlined below in ***Section 2 - requirements***
- 4. Reduces institutional expenses
- 5. Provides audit trails for all transactions
- 6. Includes a user-friendly means for reporting with customization and delivery
- 7. Provides the use of mobile credentials via IOS and Android devices.
- 8. Provides web and mobile device access for user account management.
- 9. Offers a management console that allows permissions to be segmented by user to allow for distribution of responsibilities based on need.
- 10. Seamless Integration with data imports and exports.
- 11. Online Photo Submission
- 12. Cloud Solution with open architecture with autonomous solutions
- 13. SSO Integration
- 14. URI Owned MiFare Desfire Key

GENERAL QUESTION AND EXPLANATIONS

Below are University of Rhode Island questions and requirements consisting of specific details required in the software or hardware product. You must provide an answer to each question.

- 1. Who is your competition in the higher educational marketplace?
- 2. Please outline your products and services being offered, including the features and benefits and how they address the scope being requested.
- 3. What security protocols are in place to ensure the safe transmission of information being shared through your products and services? Please provide details.
- 4. Describe areas where downtime may occur with products and services provided, historical averages of that downtime, and how you resolve downtime issues when they do occur (For purposes of providing further clarity, examples of downtime might be a website platform that goes offline, installed equipment that requires service or other products and services that can fail or go offline)
- 5. Describe your company’s Customer Service Department (hours of operation, number of service centers, etc.).
- 6. Describe the capacity of the system to provide management reports, i.e., consolidated billing by location, attendance tracking reports, etc.
- 7. Define your standard terms of payment
- 8. Provide relevant information regarding your ordering process, including the ability to purchase for group members to verify they are receiving contract pricing.
- 9. Provide a minimum of three (3) customer references for products and/or services of similar

scope dating within the past 3 years in Higher Education. Provide the following information for each reference:

- a. Entity Name
 - b. Contact Name and Title
 - c. City and State
 - d. Phone
 - e. Email
 - f. Description of Services
10. Provide information regarding whether your firm, either presently or in the past, has been involved in any litigation, bankruptcy, or reorganization.
 11. Provide a complete list of any subcontractors or partners involved in this project
 12. Fee schedule: A list price, broken out into base, module(s) as applicable; implementation, training, and maintenance, including overhead expenses. List any discounts.

SECTION 2 – SYSTEM REQUIREMENTS- See Appendix B

Each offeror must respond to each requirement listed below. The **LEVEL** column will contain M or D representing ***Mandatory*** or ***Desirable***. Please respond to every requirement by applying your best-in-practice recommended solution based on your core competencies and the functionality of your proposed system. ***Do NOT simply respond with “COMPLY,” but you must describe how your system meets or exceeds the stated requirement. Suppliers must use Appendix B provided to respond to each requirement.***

SECTION 4: PROPOSAL

A. Technical Proposal

URI will establish a technical review committee (TRC) to evaluate submitted vendor proposals related to this RFP. The proposals will be evaluated by the TRC in two phases. In Phase 1, the TEC will evaluate the written proposals. Proposals that meet the minimum scoring threshold for Phase 1 (described further below) will advance to Phase 2. In Phase 2, URI will require selected vendors to provide a presentation/demonstration of their proposed system. Phase 2 will be evaluated accordingly.

Narrative and format: The proposal should address specifically each of the following elements:

1. **Qualifications** – Provide staff resumes/CV and describe qualifications and experience of key staff who will be involved in this project. Staff will need to provide the length of time the software has been on the market and the ongoing development process in place. Software updates need to be available and current. Staff needs to be well versed in their program and should be able to assist in troubleshooting and support needs.
2. **Technical and Function Specifications Evaluation-** Please provide a detailed description of the Vendor’s experience. A list of relevant client references must be provided, to include client names, addresses, phone numbers, dates of service and type(s) of service(s) provided.
3. **Work Plan** – The work plan description shall include a detailed proposed project schedule (by task and subtask), a list of tasks, activities, and/or milestones that will be employed to administer the project, the assignment of staff members and concentration of effort for each,

and the attributable deliverables for each and will identify and describe what type of tutor training methodology will be utilized in the program. Please describe in detail, how the services are provided and maintained. Please include how accounts are maintained and what contract options are available. Please provide a specific outline of how each of the tasks in “scope of work” list will be met. The successful vendor shall meet the University's Dining Services implementation team. During these meetings, a “Detailed Project Plan” shall be developed, reviewed, and revised. The University shall provide project direction and shall maintain final approval of decisions relating to the overall design/configuration, development, implementation, testing and acceptance of the service.

4. **Approach Proposed** - This section shall describe the offeror’s understanding of the University’s requirements, including the result(s) intended and desired, the approach and/or methodology to be employed and a work plan for accomplishing the results proposed. The description of the approach shall discuss and justify the approach proposed to be taken for each task, and the technical issues that will or maybe confronted at each stage on the project.

B. Cost Proposal

Provide a proposal cost proposal using the Cost Proposal Template found in Appendix C.

C. ISBE Proposal

See Appendix A for information and the MBE, WBE, and/or Disability Business Enterprise Participation Plan form(s). Bidders are required to complete, sign and submit these forms with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.

SECTION 5: EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee (“TRC”) comprised of staff from URI/State Agencies. The TRC first shall consider technical proposals.

The evaluation of Technical Proposals will be split into two phases, the first phase will be the review and scoring of the Written Technical Proposal by the TRC, the second phase will be the scoring of the Presentation and Demonstration of the Product and/or Services offered.

In Phase 1, the TRC will score submitted written proposals. Proposals that meet or exceed a minimum threshold of 30 out of a maximum of 40 points to advance to the cost evaluation phase. Any technical proposals scoring less than 30 points shall be disqualified.

In Phase 2, URI will require selected vendors to schedule a presentation/demonstration with the TRC and score the product and/or services accordingly.

Following the scoring of Phase 2, points for Phase 1 and 2 will be combined. Technical proposals scoring 50 points or higher will have the cost proposals evaluated and assigned up to a maximum of 30 points in cost category bringing the total potential evaluation score to 100 points. After total

possible evaluation points are determined ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

The University of Rhode Island reserves the right to select the vendor(s) or firm(s) (“vendor”) that it deems to be most qualified to provide the goods and/or services as specified herein; and, conversely, reserves the right to cancel the solicitation in its entirety in its sole discretion.

Proposals shall be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Phase 1: Evaluation of the Written Proposal	
Qualifications	5 Points
Technical and Function Specifications Evaluation	15 Points
Work Plan	10 Points
Approach Proposed (implementation plan with timeline, methodology for training, post implementation support, upgrades, etc.)	10 Points
Total Possible points for Phase 1	40 Points
Phase 2: Presentation and Demonstration	
Demonstration of Technical and Functional aspects of the system	30 Points
Total Possible Technical Points	70 Points
Cost proposal*	30 Points
Total Possible Evaluation Points	100 Points
ISBE Participation**	6 Bonus Points
Total Possible Points	106 Points

*** Cost Proposal Evaluation:**

The vendor with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other vendors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{vendor's cost proposal}) \times \text{available points}$$

For example: If the vendor with the lowest cost proposal (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly costs and service fees and the total points available are thirty (30), Vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 \times 30 = 19.5$$

****ISBE Participation Evaluation:**

A. Calculation of ISBE Participation Rate

1. **ISBE Participation Rate for Non-ISBE Vendors.** The ISBE participation rate for non-ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of non-ISBE vendor's total contract price that will be subcontracted to ISBEs by the non-ISBE vendor's total contract price. For example, if the non-ISBE's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs, the non-ISBE's ISBE participation rate would be 12%.

2. **ISBE Participation Rate for ISBE Vendors.** The ISBE participation rate for ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of the ISBE vendor's total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the ISBE vendor by the ISBE vendor's total contract price. For example, if the ISBE vendor's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs and will perform a total of \$8,000.00 of the work itself, the ISBE vendor's ISBE participation rate would be 20%.

B. Points for ISBE Participation Rate:

The vendor with the highest ISBE participation rate shall receive the maximum ISBE participation points. All other vendors shall receive ISBE participation points by applying the following formula:

$$\begin{aligned} & (\text{Vendor's ISBE participation rate} \div \text{Highest ISBE participation rate} \\ & \quad \times \text{Maximum ISBE participation points}) \end{aligned}$$

For example, assuming the weight given by the RFP to ISBE participation is 6 points, if Vendor A has the highest ISBE participation rate at 20% and Vendor B's ISBE participation rate is 12%, Vendor A will receive the maximum 6 points and Vendor B will receive $(12\% \div 20\%) \times 6$ which equals 3.6 points.

General Evaluation:




Points shall be assigned based on the vendor's clear demonstration of the ability to provide the requested goods and/or services. Vendors may be required to submit additional written information or be asked to make an oral presentation before the Technical Review Committee to clarify statements made in the proposal.

SECTION 6: QUESTIONS

Questions concerning this solicitation may be e-mailed to the University of Rhode Island Purchasing Department at URIPurchasing@uri.edu no later than the time and date indicated on page 1 of this solicitation. Please reference the reference **RFP Number # indicated on the cover sheet** on all correspondence. Questions should be submitted in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related postings such as addenda. If technical assistance is required, call the Help Desk at (401) 574-8100.

SECTION 7: PROPOSAL CONTENTS

A. Proposals shall include the following:

1. One completed and signed **URI Bidder Certification Cover Form** (include in the Technical Proposal Original copy only). *Do not include in the Technical Proposal copies or Cost proposals.*
2.  **Technical Proposal** - describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The technical proposal should be limited to six (6) pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request).
 - a. One (1) Electronic copy on a CD-R or USB, marked “Technical Proposal - Original”.
 - b. One (1) printed paper copy, marked “Technical Proposal -Original” and signed.
3.  **Cost Proposal** - A *separate*, signed and sealed cost proposal reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project.
 - a. One (1) Electronic copy on a CD-R or USB, marked “Cost Proposal - Original”.
 - b. One (1) printed paper copy, marked “Cost Proposal -Original” and signed.
4.  **ISBE Proposal** – A *separate*, signed and sealed Appendix A MBE, WBE, and/or Disability Business Enterprise Participation Plan. Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation. **Do not include any copies in the Technical proposals.**
5. **Higher Education Cloud Vendor Assessment Tool (HECVAT)** –
 - a. One (1) Electronic copy on a CD-R, marked “HECVAT”

B. Formatting of proposal response contents should consist of the following:

1. Formatting of CD-Rs or USBs – Separate CD-Rs or USBs are required for the technical proposal and cost proposal. All CD-Rs and USBs submitted must be labeled with:
 - a. Vendor’s name

- b. RFP #
- c. RFP Title
- d. Proposal type (e.g., technical proposal or cost proposal)
- e. If file sizes require more than one CD-R or USB, multiple CD-Rs or USBs are acceptable. Each CD-R or USB must include the above labeling and additional labeling of how many CD-Rs or USBs should be accounted for (e.g., 3 CD-Rs or USBs are submitted for a technical proposal and each CD-R or USB should have additional label of '1 of 3' on first CD-R or USB, '2 of 3' on second CD-R or USB '3 of 3' etc.).

Vendors are responsible for testing their CD-Rs or USBs before submission as the URI Purchasing Department's inability to open or read a CD-R or USB may be grounds for rejection of a vendor's proposal. All files should be readable and readily accessible on the CD-Rs or USBs submitted with no instructions to download files from any external resource(s). If a file is partial, corrupt, or unreadable, the URI Purchasing Department may consider it "non-responsive". Please note that CD-Rs and USBs submitted, shall not be returned.

2. Formatting of written documents and printed copies:

- a. For clarity, the technical proposal shall be typed. These documents shall be single-spaced with 1" margins on white 8.5"x 11" paper using a font of 12 point Calibri or 12 point Times New Roman.
- b. All pages on the technical proposal are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments. The Vendor's name should appear on every page, including attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to.
- c. The cost proposal shall be typed using the formatting provided on the provided template.
- d. Printed copies are to be only bound with removable binder clips.
- e.

SECTION 8: PROPOSAL SUBMISSION

Interested vendors must submit proposals to provide the goods and/or services covered by this RFP on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the University of Rhode Island Purchasing Department, shall not be accepted.

Responses should be mailed or hand-delivered in a sealed envelope marked "RFP # (as indicated on the cover sheet) to

MAIL TO:

UNIVERSITY OF RHODE ISLAND
PO BOX 1773
PURCHASING DEPARTMENT
KINGSTON, RI 02881

COURIER:

UNIVERSITY OF RHODE ISLAND
PURCHASING DEPARTMENT
10 TOOTELL RD.
KINGSTON, RI 02881-2010

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other University locations or which are otherwise not presented in the URI Purchasing Department by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the URI Purchasing Department will not be considered. The “official” time clock is located in the reception area of the URI Purchasing Department. **(Please be advised that FedEx/UPS do not always arrive by 10:30 am, you would be smart to send your submission to arrive at least one day early)**

SECTION 9: CONCLUDING STATEMENTS

Notwithstanding the above, the University of Rhode Island reserves the right to award on the basis of cost alone, to accept or reject any or all proposals, and to award it in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The University may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

If a Vendor is selected for an award, no work is to commence until a purchase order is issued by the University of Rhode Island Purchasing Department.

The General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded for this RFP and can be found in the attached Bidder Certification Form.

APPENDIX A. PROPOSER ISBE RESPONSIBILITIES AND MBE, WBE, AND/OR DISABILITY BUSINESS ENTERPRISE PARTICIPATION FORM

A. Proposer's ISBE Responsibilities (from 150-RICR-90-10-1.7.E)

1. Proposal of ISBE Participation Rate. Unless otherwise indicated in the RFP, a Proposer must submit its proposed ISBE Participation Rate in a sealed envelope or via sealed electronic submission at the time it submits its proposed total contract price. The Proposer shall be responsible for completing and submitting all standard forms adopted pursuant to 105-RICR-90-10-1.9 and submitting all substantiating documentation as reasonably requested by either the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to the names and contact information of all proposed subcontractors and the dollar amounts that correspond with each proposed subcontract.
2. Failure to Submit ISBE Participation Rate. Any Proposer that fails to submit a proposed ISBE Participation Rate or any requested substantiating documentation in a timely manner shall receive zero (0) ISBE participation points.
3. Execution of Proposed ISBE Participation Rate. Proposers shall be evaluated and scored based on the amounts and rates submitted in their proposals. If awarded the contract, Proposers shall be required to achieve their proposed ISBE Participation Rates. During the life of the contract, the Proposer shall be responsible for submitting all substantiating documentation as reasonably requested by the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to copies of purchase orders, subcontracts, and cancelled checks.
4. Change Orders. If during the life of the contract, a change order is issued by the Division, the Proposer shall notify the ODEO of the change as soon as reasonably possible. Proposers are required to achieve their proposed ISBE Participation Rates on any change order amounts.
5. Notice of Change to Proposed ISBE Participation Rate. If during the life of the contract, the Proposer becomes aware that it will be unable to achieve its proposed ISBE Participation Rate, it must notify the Division and ODEO as soon as reasonably possible. The Division, in consultation with ODEO and Governor's Commission on Disabilities, and the Proposer may agree to a modified ISBE Participation Rate provided that the change in circumstances was beyond the control of the Proposer or the direct result of an unanticipated reduction in the overall total project cost.

B. MBE, WBE, AND/OR Disability Business Enterprise Participation Plan Form:

Attached is the MBE, WBE, and/or Disability Business Enterprise Participation Plan form. Bidders are required to complete, sign and submit with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.



**STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
DEPARTMENT OF ADMINISTRATION
ONE CAPITOL HILL PROVIDENCE,
RHODE ISLAND 02908**

MBE, WBE, and/or DISABILITY BUSINESS ENTERPRISE PARTICIPATION PLAN					
Bidder's Name:					
Bidder's Address:					
Point of Contact:					
Telephone:					
Email:					
Solicitation No.:					
Project Name:					
<p>This form is intended to capture commitments between the prime contractor/vendor and MBE/WBE and/or Disability Business Enterprise subcontractors and suppliers, including a description of the work to be performed and the percentage of the work as submitted to the prime contractor/vendor. Please note that all MBE/WBE subcontractors/suppliers must be certified by the Office of Diversity, Equity and Opportunity MBE Compliance Office and all Disability Business Enterprises must be certified by the Governor's Commission on Disabilities at time of bid, and that MBE/WBE and Disability Business Enterprise subcontractors must self-perform 100% of the work or subcontract to another RI certified MBE in order to receive participation credit. Vendors may count 60% of expenditures for materials and supplies obtained from an MBE certified as a regular dealer/supplier, and 100% of such expenditures obtained from an MBE certified as a manufacturer. This form must be completed in its entirety and submitted at time of bid. Please complete <u>separate forms</u> for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.</p>					
Name of Subcontractor/Supplier:					
Type of RI Certification:		<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> Disability Business Enterprise			
Address:					
Point of Contact:					
Telephone:					
Email:					
Detailed Description of Work To Be Performed by Subcontractor or Materials to be Supplied by Supplier:					
Total Contract Value (\$):			Subcontract Value (\$):		ISBE Participation Rate (%):
Anticipated Date of Performance:					
I certify under penalty of perjury that the forgoing statements are true and correct.					
Prime Contractor/Vendor Signature			Title		Date
Subcontractor/Supplier Signature			Title		Date

MAW/Disability Business Enterprise Utilization Plan - DEPs - Rev. 5/24/2017

Appendix B. System Requirements					
1.0 GENERAL FUCNTIONAL/FEATURE REQUIREMENTS					
REQ#	Level	Function Name	Description	Supplier Response	
1.1	M	General Features	Your proposed system must provide the following functions: Online Photo submission, ID Card production, meal plan management, stored valued and credit plan management, NFC (near field communication) card technology, NFC Mobile technology, point-of-sale/point-of-service integrations with POS terminals, vending machines, and off-campus merchant support. The software must interface with Entrust Instant ID, Oracle Micros Symphony 2 Point of Sale Terminals, FreedomPay, UGryd, Morpho Biometrics, Persona Campus Online, MBS Books, Cellular Vending, Grubhub, Automatic Laundry, Peoplesoft, MS Azure SSO		
1.2	M	Credential Management	The system must manage the creation, storage, and/or distribution (via interfaces) of the following credentials: Student/Employee ID, Secure Card NFC, Secure Mobile NFC, Card Serial Number, magstripe, and Barcode.		
1.3	M	Online Photo Submission	The system must provide a full-function online photo submission feature. Once a student is admitted and receives login credentials from the University of RI an image must be vetted online against an official government-issued ID.		
1.4	M	Library Bar Code Creation	Your proposed solution must create and print on the front of the plastic card or the digital/mobile ID a static barcode using industry-standard barcode encoding for our Library.		
1.5	M	ID Card Printing	With Instant ID this must allow for ID card printing at multiple sites on both the main campus and other sites operated by URI		
1.6	M	Door Access Integration	Integrates and operates with a 3rd party door access solution. The current system is Persona Campus Online.		
1.7	M	Card/Account Holder Demographics	The system must import (see integrations 2.3, 2.4, and 2.5) and store basic demographic information, including full name, preferred name, permanent and local address, and/or residence hall, designation of student/faculty/staff, email, cell phone, DOB, and housing type. Your proposed system should allow user-defined data elements.		
1.8	M	Reports	The system must provide basic accounting and auditing reports and provide user-definable reporting. Please describe your proposed system's reporting capabilities, including export capabilities such as exporting to PDF, Word, Excel, or CSV files. Examples of report types: Declining balance, charge, and cash reports. Plan Reports Activity reports Management reports Maintenance reports Historical reports System Reports Custom reporting including customer-defined fields.		
1.9	M	Online/Mobile Deposits – Stored Value Plans	Your proposed solution must allow patrons/students/staff to deposit stored value funds in real-time into their Ram Account prepaid cashless “flexible spending” account. Ram Account will be one of the stored value accounts managed by your proposed system.		
1.10	M	Meal Plan Management	Explain how Meal Plans are configured and programmed, how devices at the locations verify and deduct meals used and give examples of reports available. Present all mobile ordering options available. Please include how students and staff can access their meal and account balances and activity via the web and/or a mobile app.		
1.11	M	Mobile App	Your solution must provide a mobile app or functional mobile-aware site for customers, patrons, and students. Please describe how your proposed solution meets this requirement.		
1.12	D	Self-Service Card Value Center/Kiosk	URI has 4 self service kiosks. They will be retired upon implementation of the RFP services.		
1.13	M	NFC Mobile/Digital ID (iOS & Android)	Please outline how your solution will implement the NFC Mobile credential option for both Apple/iOS and Android mobile phones.		

1.14	M	Mobile Readers	Your system must provide a mobile reader solution. These devices will be used for applications such as attendance tracking for events, classes, and meetings. The system must easily provide a log of attendees with location, date, and time stamps. Device should also be able to be used to collect payment from stored value or credit account as well as deduct meals.		
1.15	D	Rewards/Incentive Program	A solution that includes tracking usage for incentive/reward program. Students receive points based on usage. Please explain how your system can provide this type of tracking.		
1.16	M	Vending Stored Value	Your proposed solution must allow vending machine payments with the use of at least one but preferably two or more virtual tenders. Your proposed solution should allow an NFC card and the NFC mobile ID in the Apple or Google Wallet.		
2.0 INTEGRATION-RELATED ISSUES					
REQ#	Level	Function Name	Description		
2.1	M	POS Integration: Oracle Symphony	The system must fully integrate with the Oracle Symphony 2 POS system used by our on-site Dining Services. Integration includes meal transactions, cashless-based declining balance transactions, checking the status of a plan, including balance, remaining meals, or a defined student parameter. Please provide transaction speed and offline functionality with Symphony.		
2.2	M	POS Integration:	The system must integrate with the POS system used by our on-site Campus BookStore provider, for stored value cashless transactions. They currently use the Missouri Book System.		
2.3	M	Peoplesoft/ SIS data	The system must accept student data from our current on-prem Student Information System, PeopleSoft, either through an API, Database connection, or flat-file Imports. The vendor must assist in setting up and implementing this integration.		
2.4	M	Workday Student SIS Integration	The system must provide integration with Workday Student using the Workday-provided API or other acceptable interface/Integrations. Workday Student will fully replace PeopleSoft for all functions within the next 3-5 years.		
2.5	M	StarRez Housing System Integration	The proposed solution must accept meal plan assignments through the StarRez assignment portal. Your proposed system must then automatically assign and activate meal plans and cashless plan components so that card/account holders can immediately utilize their account accessible at a point-of-sale terminal using their NFC ID card or their Mobile credential. Additionally, the system must support housing/residence hall assignments and demographic data from the StarRez housing management system.		
2.6	M	Persona Campus Online Door Access Integration	Your proposed solution must integrate with the Persona Campus Online Door Access System. Please explain how your solution integrates with the Persona Campus Online system and other access systems, should the un		
2.7	M	Photo Export	Be able to do mass/batch photo exports to a Network Folder / SFTP Site / Amazon S3 Bucket where each photo is in a separate file. The format should be JPG, and the file name should be the student or employee ID number.		
2.8	M	General Data Export	URI must be able to extract/export data from your system. Data may include but is not limited to transaction data, demographic data, plan data, and patron/customer data.		
2.9	M	General Data Updates	URI may need to update data in the system from other third-party systems or in-house solutions. Your system should allow data imports or updates through standard RestAPI and/or file imports. Imports should be able to be scheduled. Please describe how your system meets or exceeds this requirement.		
2.1	M	Off-Campus Merchant Program	The ability for local merchants to accept virtual tenders as payment sources from students, staff, and faculty. A student must be able to present their ID (or Mobile ID) for payment in the retail facility of the off-campus merchant and have their identity verified.		
2.11	M	Print/Copy system integration	Integration with Pharos Print Management. Your system must be able to provide stored value payments to the Pharos Pay-for-Print system. Please describe how your system meets this requirement.		
2.12	M	Vending (see 1.16)	Please explain/describe your vending interface solution.		
3.0 TECHNOLOGY RELATED ISSUES					

REQ#	Level	Function Name	Description			
3.1	M	Cloud Solution	The core of your proposed solution must be off-prem with no significant software components on servers on campus. The vendor must provide a fully cloud-delivered solution. A Software as a Service (SaaS) delivered solution is preferred.			
3.2	M	Single Sign-on (SSO)	Any feature that requires a student, faculty, or staff patron/customer to authenticate should use the University of Rhode Island’s Single Sign-on function. In addition, all administrative users should also be able to sign into the appropriate functional area of your system using SSO function.			
3.3	M	Mobile NFC	The vendor must work with the University of Rhode Island for a fully phased-in Mobile solution when the official URI ID is digital and can live in the Apple and Google Wallet. (See Section 1.11)			
3.4	M	NFC Card	Software and hardware must be compatible with NFC card types.URI will be integrating MIFARE DesFire EV3 while owning its own key.			
3.5	M	Card Printer Software	Your solution must work with Instant ID			
3.6	M	Automation	The system must allow for various processes, data, and workflow automation. Please describe how your solution provides such features.			
3.7	D	Test System / Sandbox	Please include a test system (aka sandbox) in your proposal to expedite validation. This should allow URI staff to test configurations, processes, or procedures without impacting the production system.			
4.0 INSTALLATION, TRAINING, AND SUPPORT						
REQ#	Level	Function Name	Description			
4.1	M	Project Management	It is the expectation that the winning bidder will provide project management throughout the implementation process.			
4.2	M	Installation	The successful vendor must provide full support and assistance with the URI staff for complete system implementation. Please provide your implementation schedule, standards, and timeline.			
4.3	M	Integrations	The successful vendor must provide full support and cooperation with URI staff for all system integrations. It is an ongoing process and requires more long-term or phased approaches. Please provide information on how your company accomplishes integrations.			
4.4	M	Certification	Please provide your project management process for certifying that the system is fully installed and operational. Note that the University of Rhode Island and the vendor must agree on and certify that the system is fully installed and operational.			
4.5	M	Initial Training	The Campus ID & Dining Office must be able to operate your solution once the system goes live. Please explain your process for ensuring that the University of Rhode Island is prepared for when all components of your solution go live.			
4.6	M	Regular Training	Please provide how URI staff can acquire ongoing training. Please provide pricing in the cost proposal section.			
4.7	M	Technical Support	Please explain your overall technical support process, including hours, holidays, and after-hours support. dedicated customer service representative for the account preferred			
4.8	M	Maintenance	Maintenance services must meet the University’s ongoing performance requirements for as long as the University utilizes the software. Services fees will be reflected in the cost-proposal section and are expected to remain consistent for the first two years of the contract.			
5.0 PHASES OF IMPLEMENTATION						
REQ#	Level	Function Name	Description			
5.1	1	Symphony POS Integration (Section 2.1)	Meal plan swipes and declining balance payments must work with the Symphony Point of Sale system without additional interfaces.			

5.2	1	Book Store POS Integration (Sect 2.2)	Declining Balance payments must work immediately with our Campus Bookstore point of sale system			
5.3	1/2	ID Card, Contactless transaction (1.2 & 1.3)	Both 5.1 and 5.2 must function using a contactless portion of the student ID card & Mobile Credential.			
5.4	1	Online Photo Submission (1/3)	Allow students, staff, faculty, and contractors to submit photos online which can be used immediately with the card production system and in a future state with the Mobile ID in the Apple or Google wallet.			
5.5	1	ID Card Production (1.1, 1.5)	Your system must immediately be able to produce ID Cards. Please explain how we could have a phased transition from our current non-smart card state to the MIFARE cards as part of the RFP. Consider Vending in your explanation.			
5.6	1	Grubhub Interface	Your system must immediately work with Grubhub. Please explain our options regarding implementing Grubhub so it will accept a stored value plan and/or cash-equivalency meal plan in your system.			
5.7	2+	Off-Campus Merchant Program (2.10)	Please provide your project management process for certifying that the system is fully installed and operational. Note that the University and the vendor must agree on and certify that the system is fully installed and operational.			
5.8	2+	Hand Held Mobile Readers (1.14)	See section 1.14 – Note: we will not initially utilize this feature but it must be present for potential future state.			
5.9	2+	Vending for Declining Balance (1.16)	Please outline the process for how your system allows a contactless (NFC) solution so that vending machines will accept the campus mobile ID from the Apple or Google Wallet (NFC-based) as well as an NFC card for the estimated 5% of campus card holders that will require a physical card after mobile is fully implemented.			

	Appendix C. COST PROPOSAL			
Item	Description	Quantity	UOM	Cost
	YEAR ONE			
1	Product and Product Line Pricing- Software	1	Each	\$
2	Product and Product Line Pricing- Hardware	1	Each	\$
3	Implementation Services	1	Each	\$
4	Connections	1	Each	\$
5	Information Connections	1	Each	\$
6	Access Control Connections	1	Each	\$
7	Transaction Connections	1	Each	\$
8	Card Production	1	Each	\$
9	Online Account Management	1	Each	\$
10	Meal Plan Portal	1	Each	\$
11	Virtual Barcode Credential in Wallet	1	Each	\$
			SUBTOTAL	\$
	YEAR TWO			
12	Annual License Fee	1	Each	\$
13	Annual Support and Maintenance, including upgrades	1	Each	\$
			SUBTOTAL	\$
	YEAR THREE			
14	Annual License Fee	1	Each	\$
15	Annual Support and Maintenance, including upgrades	1	Each	\$
			SUBTOTAL	\$
	YEAR FOUR			
14	Annual License Fee	1	Each	\$
15	Annual Support and Maintenance, including upgrades	1	Each	\$
			SUBTOTAL	\$
	YEAR FIVE			
14	Annual License Fee	1	Each	\$
15	Annual Support and Maintenance, including upgrades	1	Each	\$
			SUBTOTAL	\$
			TOTAL	\$
	Please attach any additional information to cost if applicable			