Request for Proposals (RFP)

No. RFP UB-27-BK-10

FOR

Academic Faculty Management Software Platform

ISSUE DATE: October 28, 2026

ISSUING OFFICE:

UNIVERSITY OF BALTIMORE
Office of Procurement
1420 N. Charles Street, Baltimore, MD 21201

Beth Kirk, Director of Procurement /UBalt Procurement Officer
Email: bvukirk@ubalt.edu

The Issuing Office is the sole point of contacts for this procurement.

NOTICE: Prospective Proposers who have received this document from a source other than the Issuing Office are advised to contact the Issuing Office. The University does not take responsibility if any Prospective Proposer is not informed of communication issued under this RFP. It is the sole responsibility of any Prospective Proposer to visit the University's Bid Board for all documents relating to this RFP. Visit: **University of Baltimore: Secure Bid Submission - Bid Locker**

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SOLICITATION SCHEDULE

Issued Date:	October 28, 2026
Last Day for Questions:	November 5, 2026, at 12:00 PM ET
Responses to Questions by:	COB November 13, 2026
Technical Proposal Due Date:	December 2, 2026, at 12:00 PM ET
Virtual Oral Presentation/Discussion Session(s): For invited shortlisted firms only	January 12&13, 2027 (Projected)
Financial and Price Proposal Firms Only)	January 29, 2027, at 10:00 AM ET (Invite
Contractor(s) Selection Anticipated to be finalized:	February 12, 2027 (Projected)
Contract Commencement:	March 1, 2027 (Projected)

Note: Proposals are to be provided by the due date noted above. Proposals are to be submitted in digital format to Issuing Office – see instructions below.

SECTION I.

GENERAL INFORMATION AND OVERVIEW

1.1 OBJECTIVE.

The University of Baltimore (UBalt) is soliciting proposals from qualified professional firms for **an Academic Faculty Management Software (AFMS) Platform** ("System" or "Solution" or "Platform"). The University seeks a solution that will enable the efficient collection, management, and reporting of faculty activities across teaching, research, service, and professional development, supporting faculty in documenting their contributions while ensuring institutional compliance with accreditation, tenure and promotion, workload reporting, strategic planning requirements, and other initiatives.

The selected system should enhance data accuracy, streamline reporting and review processes, and provide robust analytics to support data-driven decision-making at the department, college, and institutional levels. Ultimately, the solution will serve as a central repository for faculty activity data, including review, promotion, and tenure actions, reducing administrative burden while increasing transparency and accessibility of information. The University aims to implement a Solution that is user-friendly, scalable, and capable of integrating with existing institutional systems, including human resources, financial, and learning management systems.

Additionally, the University is seeking a system that Faculty members will see value in using, and not solely for administrative purposes. The system needs to provide direct benefits to both faculty and administrators.

The University reserves the right to purchase items and services not specifically listed in this RFP from the successful contractor.

1.2 OVERVIEW OF THE UNIVERSITY OF BALTIMORE.

Founded in 1925, The University of Baltimore is one of 12 institutions that comprise the University System of Maryland, the nation's 12th largest university system. The University of Baltimore offers career-focused graduate, doctoral and undergraduate programs and certificates in law, business, public affairs and the applied arts and sciences. Designed for working adults, UBalt academic programs are offered in flexible formats, including day, evening, weekend, in person, online and hybrid options. UBalt offers excellent teaching and a supportive community for graduate, professional and undergraduate students in an environment distinguished by outstanding student outcomes, academic research and public service, particularly in the Baltimore region. The University is organized into four schools/colleges, including the School of Law, the Merrick School of Business, the Yale Gordon College of Arts and Sciences, and the College of Public Affairs.

In fall 2025, UBalt enrolled 3,168 students; 1,127 undergraduates, 1,004 graduate students, and 746 law school students.

For more information about UBalt, visit: https://www.ubalt.edu/about/index.cfm

1.3 ISSUING OFFICE.

Beth Vu Kirk, Director of Procurement
University of Baltimore
Office of Procurement
1420 N. Charles Street, Baltimore, MD 21201
bvukirk@ubalt.edu

The Issuing Office shall be the sole point of contact with the University for purposes of the preparation and submitting proposals in response to this solicitation.

1.4 MINIMUM QUALIFICATIONS.

Firms must demonstrate the following qualifications, at a minimum, to be deemed eligible for award by completing Attachment B. Firms that do not include the required information that demonstrate the minimum qualifications shall not be considered for award. The University reserves the right to waive this requirement.

- Proposers shall have a minimum of five (5) years of experience providing at minimum three (3) different higher learning institutions an Academic Faculty Management Software Platform.

1.5 QUESTIONS AND INQUIRIES.

All questions and inquiries regarding this procurement must be directed to the individual(s) referenced with the Issuing Office above. Questions must be submitted in writing via the link provided below. Inquiries will receive a written reply/confirmation, submitted inquiries that are not confirmed by the University may not have been received. It is the sole responsibility of potential proposers to ensure inquiries/questions are received and responded to in writing prior to the last day questions are due. Only written communication relating to the procurement shall be considered.

All questions will be answered in writing, in the form of an addendum to the RFP. Both questions and answers will be distributed, without identification of the inquirer(s), to all prospective contractors who are on record with the Procurement Officer as having received this RFP. No oral communications from the project team can be relied upon for proposal purposes.

Should a Proposer find discrepancies in the specifications or contract provisions included in this solicitation, or should there be doubt as to the meaning or intent of any section or subsection herein, the Proposer should request clarification from the Procurement Officer. Failure to request a clarification prior to the due date will be a waiver of any claim by the Proposer for expenses made necessary by reason of later interpretation of the contract documents; Proposers will be bound to the University's interpretation.

Potential proposers are advised that the University reserves the right to use its best judgment in choosing to respond or not to respond to any questions received before or after the above stated cut-off date for questions.

All such questions and inquiries must be received by the date provided in the RFP or as updated via Addendum.

All Questions must be sent via a Word attachment to the following link: University of Baltimore: Secure Bid Submission - Bid Locker

1.6 RFP REVISIONS OR AMENDMENTS TO THIS RFP.

The University reserves the right to amend this solicitation at any time prior to the proposal due date. If it becomes necessary to amend any part of this solicitation, the Procurement Office will post a copy of the amendment or addendum to the University's Bid Board.

Interested Offerors are solely responsible for checking the Bid Board (Bid Locker) daily (recommended twice a day, morning and at close of business to ensure your firm is informed). The Procurement Official may also send a copy of the amendment or addendum to all prospective Proposers that are known to have received a copy of the RFP. All amendments/addenda will be identified as such. If necessary, the proposal due date may be extended. Proposers are required to acknowledge the receipt of all amendments, addenda, and clarifications issued. (Reference Appendix A, provided under a separate cover)

1.7 PRE-PROPOSAL CONFERENCE.

Not held.

1.8 PRE-PROPOSAL MODIFICATION OR WITHDRAWAL OF OFFER.

Proposals may be modified or withdrawn by written notice received at the Issuing Office before the proposal due date and time.

1.9 CLOSING DATE.

Proposals must be submitted no later than the date and time specified in the Solicitation Schedule or as amended. Proposals shall be submitted in digital format. Proposals must be sent to the issuing office by the date and time noted in this RFP or as amended via an addendum. Attachments must not be zipped or compressed. Proposals, amendments to proposals, or requests for withdrawal of **proposals arriving after the closing time and date may not be considered**. The names of offerors and awarded firm will not be released until after award. At the University's sole discretion, the Solicitation Schedule may be modified. Note: The time and date stamp used by the University's software system is the official record.

1.10 NO PUBLIC OPENING OF PROPOSALS.

A public opening of technical and price proposals will not be held.

1.11 PUBLIC INFORMATION ACT NOTICE.

Contractors should give specific attention to the identification of those portions of their proposals that they deem to be confidential, proprietary information or trade secrets and provide any justification why such materials, upon request, should not be disclosed by the State under the Access to Public Records Act, State Government Article, Title 10, Subtitle 6, Annotated Code of Maryland.

Contractors must clearly identify each and every section that is deemed to be confidential, proprietary or a trade secret (it is NOT sufficient to preface your proposal with a statement that the entire content is proprietary, or to use a page header or footer that arbitrarily marks all pages as confidential). Any individual section of the proposal that is not labeled as confidential with an accompanying statement concerning the rationale for its claimed confidentiality shall be considered public information.

1.12 PROCUREMENT METHOD.

This solicitation shall be conducted in accordance with the provisions of the University System of Maryland's (USM) Procurement Policies and Procedures. Specifically, the procurement method employed shall be Competitive Sealed Proposals.

1.13 ECONOMY OF PREPARATION.

Each proposal should be prepared simply and economically, providing a straightforward, concise description of the contractor's offer and capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content.

1.14 CONTRACT TERM.

The initial contract term will be for three (3) years, with five (5), one-year renewal terms.

1.15 Intentionally Left Blank.

1.16 CONTRACT ADMINISTRATION.

A system for contract administration shall be maintained to ensure contractor conformance with the terms, conditions and specification of the contract and to ensure adequate and timely follow up.

1.17 CONFIDENTIALITY STATEMENT FOR CONTRACTORS.

The successful Proposer will be required to sign the Confidentiality Statement for Contractors. See Appendix C (provided under separate cover) for the contractual confidentiality obligations.

1.18 ACCEPTANCE OF TERMS AND CONDITIONS.

By submitting a Proposal, a Proposer shall be deemed to have accepted the terms, conditions, and requirements set forth in this RFP. The RFP including all addenda in total shall be incorporated into the Contract by reference. Any exceptions to the terms and conditions shall be submitted as specified in the Response Requirements section of this Solicitation. Contract exceptions not provided in the format required under this RFP shall not be considered. Exceptions included in submission are not made part of the awarded contract unless approved by UBalt.

1.19 MINORITY BUSINESS ENTERPRISES (MBE).

No goal is established.

1.20 The Technical Proposal and/or Financial Proposal, either individually or collectively, is considered by UBalt to be an Offer.

1.21 ALTERNATE SOLUTION PROPOSALS.

All proposals will receive careful consideration if they do not depart from the intent of these specifications and are in the best interests of UBalt as interpreted by UBalt. However, if the services offered differ from the provisions contained in these specifications, such differences must be explained in detail. If any alternate equipment, services, features, or other items are offered, supplementary proposals may be submitted in an abbreviated form of the basic format with a separate financial proposal.

A Contractor may offer exceptions to any technical requirement. UBalt will evaluate any offered alternatives in terms of its needs and interests and either accept or reject the alternative offers as it deems it to be in its best interests. However, inability to contractually guarantee any statement or specification stated in your response may result in elimination from consideration.

1.22 MULTIPLE PROPOSALS.

Any single offeror may present **one** proposal. The proposal must be complete and respond to all the requirements of the RFP.

END OF SECTION I

SECTION II.

SCOPE OF SERVICES

2. TERMS AND DEFINITIONS:

Below are terms and definitions used in this RFP and Contract, unless modified by the University via an Addendum or Amendment:

- AACSB: Stands for the Association to Advance Collegiate Schools of Business International. This accreditation body sets standards for business schools.
- ABA: Stands for the American Bar Association. This accreditation body sets the standards for law schools.
- PeopleSoft An Oracle product and the university's Enterprise Resource Planning (ERP) system used to manage administrative functions and data, including student information and course details. Integration with PeopleSoft is a key requirement for the FAR solution.
- CV: Curriculum Vitae, a comprehensive record of a faculty member's accomplishments, including teaching, research, and service.
- FAR: Faculty Activity Reporting. A system designed to collect, manage, and report on faculty activities across teaching, research, service, and professional development.
- Workday: A cloud-based system used at UBalt to manage human resources, finance, and research administration, including grants, proposals, and compliance. Integrating with Workday allows for the automated capture of faculty employee data and research-related data.
- MSCHE: Stands for the Middle States Commission on Higher Education. This accreditation body is responsible for accrediting the University/Member.
- NIH: National Institute of Health.
- OIT: UBalt Office of Technology Services.
- RPT: Reappointment, Promotion, and Tenure, a critical process in academic institutions.
- RPT Dossier: A collection of materials used in the reappointment, promotion, and tenure review process.

2.1 SCOPE OF WORK FOR ACADEMIC FACULTY MANAGEMENT PLATFORM:

2.1.1 Purpose and Scope

The Contractor shall provide a platform solution that will enable the efficient collection, management, and reporting of faculty activities across teaching, research, service, and professional development, supporting faculty in documenting their contributions while ensuring institutional compliance with accreditation, tenure and promotion, workload reporting, strategic planning requirements, and other initiatives.

The software platform shall enhance data accuracy, streamline reporting and review processes, and provide robust analytics to support data-driven decision-making at the department, college, and institutional levels. The Solution will serve as a central repository for faculty activity data, including review, promotion, and tenure actions, reducing administrative burden while increasing transparency and

accessibility of information. The Solution shall be user-friendly, scalable, and capable of integrating with existing institutional systems, including human resources, financial, and learning management systems.

2.1.2 Timeline

Promotion and Tenue (P&T) Module shall be implemented by June 30, 2027, or as specified by the University at a later date.

The Platform will be completed, tested and ready for deployment no later than January 28, 2028, or as specified by the University at a later date.

2.1.3 System Capabilities.

The solution shall:

- Allow faculty and administrators to view, submit, approve, acknowledge, and edit workload plans, annual evaluations, and annual reports,
- Provide a system for the Reappointment, Promotion and Tenure (RPT) process,
- Record and display faculty activity across teaching, research, service, and professional development,
- Support accreditation processes,
- Retain historical data,
- Generate multiple report types,
- Reduce the amount of manual entry required by users,
- Have workflow capabilities to facilitate multiple processes,
- Feature an easy-to-learn user interface,
- Comply with university policy on Institutional Data Management (UB-III-3.1).

Note: The solution is not intended to replace existing accreditation processes.

2.1.4 Use Cases.

The system shall support a variety of use cases, including but not limited to:

- Faculty Activity Reporting will be streamlined, allowing faculty members to record their activities and accomplishments, and make the data available for reporting [UC-1].
- Faculty Review, Promotion and Tenure, facilitating the entire lifecycle of the process including dossier, submission, and approval[UC-2]. .
- The system will support the generation of CVs and Reports, enabling users to create various reports for annual reviews, promotion and tenure, and accreditation [UC-3].
- The system will also integrate with existing systems to streamline data flow and reduce manual data entry [UC-4].

- Submitting faculty rosters for accreditation will be streamlined by allowing administrative staff to easily generate reports that meet the specific requirements of accrediting bodies [UC-5] including specific preset templates.
- Updating faculty web profiles will ensure that faculty accomplishments are always current, which will enhance the institution's public image and make it easier to make connections between departments [UC-6].
- The system will also support the annual faculty evaluation process, providing a centralized location for faculty members to submit their activity reports, and for department chairs and review committees to provide feedback [UC-7].

2.1.5 Access and Permissions.

Information shall be accessible to authorized users based on their roles:
- Faculty members (data entry and viewing own records)
- Department chairs (review and approval functions)
- Review committees (evaluation access)
- Administrators (reporting and analytics)
- Other authorized users for annual evaluations, promotion and tenure reviews, and institutional reporting needs

2.1.6 Workflows.

The system shall have the ability to create workflows and assign tasks to individuals or groups (committees).

2.1.7 Technical Requirements.

- **Browser Compatibility:** The system must be accessible in the most popular internet browsers:
- Mozilla Firefox
- Chrome
- Safari
- Edge
- **Branding:** The User Interface must meet UBalt branding standards.
- **System Dependencies:** The system must be able to integrate with PeopleSoft, Workday, Explorance Course Evaluation Tool, and Canvas, with API and web integration capabilities.

2.1.8 Non-Functional Requirements.

- **Accessibility:** The system shall be accessible to people with disabilities in accordance with the Americans with Disabilities Act of 1990.
- **Availability:** The system shall be accessible at all times except when maintenance is being performed. The system shall achieve 99.5% up time.
- **Data Backup:** The system's database should be backed up in case of failure.

- **Minimal Training:** The system should be able to be used by all faculty and staff with minimal training needed.
- **Service Level Agreement:** The vendor shall have a Service Level Agreement that specifies the timeframe within which changes will be made to the system.
- **Secure Storage:** Uploaded documents should be stored securely

2.1.9 Data Requirements and Integration.

The Academic Faculty Management Software Platform shall accept data from multiple sources and provide seamless integration capabilities:

a. PeopleSoft Integration:
- Import and synchronize teaching load data from relevant PeopleSoft tables
- Capture course and class schedule data
- Import student demographics and course information
- Synchronize faculty appointments and demographics

b. Workday Integration:
- Import sponsored projects information
- Synchronize research expenditures

c. Kauli Integration:
- Capture research grants and proposals data

d. Explorance Integration:
- Capture course evaluation data
- Import student reviews of teaching

Data Input.

The Academic Faculty Management solution should accommodate various data input methods:

- **Direct Input:** Faculty members should be able to directly enter their activities and accomplishments
- **File Uploads:** The system should support file uploads, such as CVs and supporting documents
- **Automated Data Feeds:** Automated data feeds from integrated systems
- **Import Capabilities:** Allow users to import data from CSV or spreadsheet files and other systems such as Google Scholar
- **Preset Menus:** Use preset dropdown menus for data entry
- **Text Boxes:** Incorporate text boxes for open-ended responses
- Automated data feeds from Modern Campus
- Import capabilities from Google Scholar and ORCID

Data Outputs.

The Academic Faculty Management solution should generate a variety of outputs to support different reporting and analysis needs:

- **Faculty CVs:** Produce faculty CVs in various formats (e.g., NSF, NIH)
- **Promotion and Tenure Dossiers:** Generate dossiers for promotion and tenure review processes
- **Annual Activity Reports:** Create annual activity reports for faculty and administrative purposes
- **Accreditation Reports:** Generate reports that meet the specific requirements of accrediting bodies with preset templates
- **Data Exports:** Enable data exports for analysis and reporting in various formats (e.g., PDF, Excel, HTML, MS Word, CSV)
- **Workload Percentage:** Calculate workload percentages

2.1.10 Data Management and Lifecycle.

The system shall provide comprehensive data management capabilities:

- Allow faculty to input activities, accomplishments, and other work-related data
- Enable easy upload/download and import/export of information via API capabilities or other integrations
- Ensure data accuracy through validation mechanisms
- Provide secure data storage with appropriate backup procedures
- Support the complete data lifecycle, including data entry, validation, storage, retrieval, reporting, archiving, and deletion, adhering to university policies and regulations

2.1.11 Data Retention Requirements.

Retention requirements are important for accreditation reporting, for active and departed (inactive) faculty. The system shall allow for marking individuals as active or inactive without deleting their profiles to retain necessary information. Specific retention periods should be determined for different data types, considering legal, regulatory, and operational needs.

The system shall retain the following categories of information:

1) Information on faculty research, teaching, and service activities:

Research:

- Publications
  - Bibliographic information
  - The work itself
  - Working papers/works in progress
- Conference presentation information

- Funded research information

Teaching:
- Courses taught
- Dissertation/thesis service
- Students mentored
- Other teaching related activities

Service:
- Internal (university) service activities
- Professional service activities
- Academic service activities
- Community service activities
- Consulting activity

2) Administrative documents related to faculty performance:
- Available to both faculty and administrators
- Potential Items:
  - Annual performance evaluations
  - Student evaluations of teaching
  - 5-year plans
  - Faculty success plans
  - Formal RPT evaluations
  - Formal PTR evaluation
  - Peer reviews of teaching

The system shall retain information "indefinitely" and in accordance with the University's policy on records retention and disposal.

All information and data inputted in the system shall be retained for accreditation reporting. Former and active faculty data or profiles shall be retained in the system regardless of the faculty/staff members' hiring status. The information/data shall be accessible by employees designated by UBalt.

2.1.12 Reporting Requirements.

A comprehensive suite of reports is needed to support stakeholders and decision-making processes. These reports shall be flexible to accommodate the needs of different units.

Report Customization
The system shall allow for customization of report formats and layouts and be able to display data visualizations.

Report Users and Requirements:

A. Department Chairs and Deans:

- Generate reports for faculty within their units
- Reports may be at the individual level, unit level, or some combination (all people associated with a center, which may cross departmental lines)

B. Accreditation Personnel:

- MSCHE, AACSB, ABA and other accreditation bodies have specific reporting requirements for their site visits
- System shall be capable of generating these reports with specific preset templates

C. **Faculty:**

- Run reports on their own information
- Create a CV
- Run their own annual activity report to check for accuracy
- Run any other reports that are relevant to their performance

D. **External Relations:**

- Generate ad hoc reports detailing faculty information, such as biographical, research, and teaching data

2.1.13 Data Selection Criteria.

Data selection criteria shall be defined for each report and data export function to ensure that the retrieved data is accurate, relevant, and meets the specific needs of the user.

These criteria may include filters based on:
- Academic year
- Semester
- Department
- College
- Faculty rank
- Activity type

2.1.14 Security Requirements.

The Academic Faculty Management system must adhere to university security policies and standards to protect sensitive data and ensure system integrity:

Authentication and Authorization:

- Multi-factor authentication to verify user identities and prevent unauthorized access

- Single Sign-On (SSO) integration with university platforms: SAML/Shibboleth, Educause InCommon, or Microsoft Entra ID (preference given to systems supporting SSO)
- Role-based access control mechanisms to restrict user access based on roles and permissions

Data Protection:

- Encrypt sensitive data both in transit and at rest to protect against unauthorized disclosure
- For cloud-hosted solutions: vendor must provide documentation demonstrating the cloud solution offers the same protections as premises-based solutions, including confidentiality, integrity, availability, security, and privacy.

2.1.15 Support Requirements.

To ensure successful implementation and ongoing support, the vendor must provide:

Training:

- Comprehensive training materials and resources for all user groups
- Coverage from basic navigation to advanced reporting features

Documentation:

- Detailed user manuals
- Online help resources
- FAQs addressing common questions and troubleshooting

2.1.16 Policy Compliance.

Institutional Policies:
Academic Faculty Management solutions shall comply with:

- **Section VI-8.2** of the UBalt Policy on Faculty Responsibilities and Workload (link below)
  https://www.ubalt.edu/_migrated-binaries/ubalt.edu/policies/academic/vi-8.2.pdf
- **Section II-1.25** of the USM Policy on Faculty Workload and Responsibilities (link below)
  https://www.usmd.edu/regents/bylaws/SectionII/II-1.25.pdf
- **University policy on Institutional Data Management (UB-III-3.1) see Exhibit A, provided under a separate cover.**

Policy Considerations:
The Academic Faculty Management solution shall align with institutional standards and legal requirements across:

- Data handling
- Security
- Privacy
- Compliance with broader regulatory frameworks

2.1.17 Other Requirements:

Contractor shall:

- Ensure continuity of services in the event of the company being acquired or a change in management
- Upon request, make available audit logs recording privileged user and regular user access activities, authorized and unauthorized access attempts, system exceptions, and information security events.
- Block the secondary use of institutional data
- Establish and maintain industry standard technical and organizational measures to protect against:
    - Accidental destruction, loss, alteration, or damage to the materials
    - Unauthorized access to confidential information
    - Unauthorized access to the services and materials
    - Industry known system attacks (e.g., hacker and virus attacks)
- Report any confirmed or suspected breach of institutional data to the institution
- Grant the University or an appointed audit firm the right to audit the vendor's security related to the processing, transport, or storage of institutional data
- Upon request, make available a third-party review that satisfies the professional requirement of being performed by a recognized independent audit organization
- Upon request, provide assessment reports performed by a recognized independent audit organization. Examples of acceptable reports include (but are not limited to):
    - AICPA SOC2/Type2
    - PCI Security Standards
    - ISO 27001/2 Certification
    - FedRAMP
- Upon request, make available evidence of business continuity and disaster recovery capabilities to mitigate the impact of a realized risk

END OF SECTION II

SECTION III.

Article 1. SUBMISSION AND TECHNICAL PROPOSAL RESPONSE REQUIREMENTS

1.1. SUBMISSION.

Proposals are to be provided to the Issuing Office in accordance with the Solicitation Schedule. Submit Proposals using the following Bid Locker link: University of Baltimore: Secure Bid Submission - Bid Locker

Proposal documents are to be submitted as an attachment in PDF format (no zipped files). Hyperlinks to software products sent to the Issuing Office that indicate that the Proposal is posted by the Proposer on an electronic site may be rejected or considered non-responsive if contract terms and conditions (i.e., a Click-Through Agreement) are required to be accepted by the University in order to download the Proposal. By providing digital copies of the Proposal to the University, the Proposer grants the University the unlimited right to generate additional digital and/or paper copies for distribution for the purposes of review, evaluation and archive.

The University may deem a submission non-responsive if received after the due date and time. The date and time of the submission is time stamped by the Bid Locker portal and shall be the official date and time of submission to Procurement.

Financial Proposals shall not be included with Technical Proposals. ONLY shortlisted firms shall be invited to submit a Financial Proposal.

Proposers are to:

SUBMIT ONE PDF TITILED: "*FIRM NAME_TECHNICAL PROPOSAL_UB-27-BK-10*"

1.2 INITIAL TECHNICAL CRITERIA.

Clear, concise, yet detailed responses to the technical criteria below are to be provided in the Technical Proposal. In addition, the Bid/Proposal Affidavit and Acknowledgement of Receipt of Addenda (if applicable) must be included. Standard sales material may be provided, but must be attached as an appendix rather than included within the body of the Proposal.

Proposers must organize their proposal in the same order as the requirements listed in the RFP. Each requirement must be addressed in the proposal, and that response should be enumerated with the same section numbers listed in the RFP Requirement.

The following information must be furnished in the Technical Proposal per this solicitation. Failure to include any of the items listed below may disqualify your firm's response. Proposers are requested to compile their Proposals in the same order. It is the Proposer's responsibility to tailor its response to demonstrate its qualifications to perform the scope of work specifically for the University of Baltimore.

1.3 TECHNICAL RESPONSE REQUIREMENTS.

Proposals that concisely present the information requested in the order and manner requested will be considered more favorably than a Proposal from a Proposer of commensurate qualifications that displays a lack of organization, conciseness, or attention to detail. The Proposal should be divided and organized by clearly defined AND separated Sections (1-11) referencing and responding to each response requirement.

1.3.1. Section 1: Transmittal Letter

A transmittal letter referencing the proposal title and number. The transmittal letter shall be signed by an individual who is authorized to bind the firm to all statements, including services and financial statements, contained in the Proposal, must accompany the Technical Proposal. The letter should be an executive summary that clearly and concisely summarizes the content of the Technical Proposal. Include the Proposer's official business address and state in which it is incorporated or organized (if Proposer is not an individual). **An appropriate contact name, title, phone number, and email address should also be provided for use by the University during the procurement process.** Do not include price information in the transmittal letter.

Signing of Forms: A Proposal, if submitted by an individual, shall be signed by the individual. If submitted by a partnership, a Proposal shall be signed by such member(s) of the partnership with authority to bind the partnership. If submitted by a corporation, a Proposal shall be signed by an officer, and attested by the corporate secretary or an assistant corporate secretary; if not signed by an officer, there must be attached a copy of a board resolution or that portion of the by-laws, duly certified by the corporate secretary, showing the authority of the person so signing on behalf of the corporation.

1.3.2 Section 2: Table of Contents.

Include a Table of Contents displaying the organization of the proposal being submitted.

1.3.3. Section 3: Executive/Management Summary.

The Executive/Management Summary should contain a brief synopsis of how the Offeror's proposal meets the needs of the University. Included in this summary a statement:

1. Your firm's proposal shall remain in effect for a minimum period of 180 days following the RFP opening date to allow for sufficient time for evaluation, approval and issuance of award notice.
2. A statement your firm's offer shall remain firm for the duration of any resulting award and extensions.
3. The Executive Summary shall also include acceptance, and verification of compliance with Maryland and a capability of performance statement.

1.3.4 Section 4: Company/Firm Profile.

Proposers shall have a minimum of five (5) years of experience providing at minimum three (3) different higher learning institutions an Academic Faculty Management Software Platform.

An Offeror's proposal response shall provide documentation to demonstrate a history of program stability. Describe as specifically as possible your history and experience in providing a Faculty Activity Reporting platform and related services to clients in a university/higher education setting.

The Offeror shall include in their Section 4 submission:

1. Complete the **Company Profile Form (Attachment A)**
2. The Offeror shall submit a general company profile. The information provided should include, but not be limited to number of years in business, principals of the firm and number of employees, etc.
3. Organizational Chart: An organizational chart of the Proposer's team. The Proposed team shall include all individuals that shall provide services under the awarded Contract.

1.3.5 Section 5: Contractor Experience and References (Attachment B)

Complete Attachment B, Contractor Experience and Reference Form, list and individually describe three (3) recent (in the last 5 years) clients your firm is/has provided AFMS services. Provide clients that best illustrate the firm's qualifications and clients that are similar to UBalt's needs. Proposers should include AFMS services where the key individuals who were directly responsible for and directly assigned to the current FAR services also will be assigned to UBalt's AFMS platform services. Proposers shall provide examples of similar size and scope to this solicitation/RFP that have been or is currently successfully managed.

Provide the following information:

1. Client name, address, point of contact, phone number and email address (The point of contact should be a person who was directly responsible for the program); **(This information may be used for client references); term of contract, value of contract and key personnel assigned to manage the AFM software services.**
2. By completing page two of Attachment B, Proposers shall provide references for all clients where services have been **terminated** in the past twelve (12) months indicating the Name of the contract, Contact name, address, phone number and email address. Indicate the contract term and contract value.

Note: The University may contact at any time during the procurement process known clients of the Proposer to obtain additional information/references regarding the Proposer's platform and services or their Key Personnel.

1.3.6 Section 6: Key Personnel and Project Team (Attachment C)

Complete **Attachment C, Key Personnel Form**.

Provide the Key Personnel Form for each person assigned to manage UBalt's platform and related services.

The Proposal must include:

The Offeror's firm is not to provide Attachment C for all employees, but rather those people who will be intimately involved with the project. Specifically, the Offeror is to submit resumes of those individuals with whom the University would be directly working should the proposer be selected for contract award.

Personnel Commitment: By submitting the names of these key personnel for consideration, the Proposer is committing these people to the University for the software/platform services' during the life of the contract. No personnel changes will be permitted without written authorization from the University prior to such changes or assignments occurring via a contract modification issued by the Procurement Officer.

In the event that circumstances necessitate to add or substitute staff for any of the key personnel positions designated, the individual(s) proposed must demonstrate similar qualifications, experience and documentation as required in this solicitation to successfully perform such duties and sufficient information to demonstrate that the proposed individual(s) meets or exceeds the qualifications of the Key Personnel to be replaced. The Procurement Officer shall have the sole right to determine whether key personnel proposed as substitutes qualify.

1.3.7 Section 7: Standard and Required Services (Attachment D)

Offerors shall complete the **Vendor Capabilities Questionnaire, see Attachment D**. The Questionnaire comprises of software and service features, functionality and capabilities the University requires and desires. The Questionnaire shall reflect your software features and services. All tabs must be completed.

Complete the Questionnaire by selecting (1) "yes" or 'no" (as applicable) if your firm provides the services and (2) provide additional information/details regarding each service your firm does or does not offer. If your firm requires more space to respond to a question/questionnaire service item, your firm may add additional space/page(s) following that question as additional pages. Ensure your firm numbers the additional pages the same number as the Question/Questionnaire

service item. Your firm's submission and response(s) must be submitted in the same numerical format as provided.

DO NOT include pricing in the Questionnaire. Provide this in Excel format as a separate document.

1.3.8 Section 8: Implementation Plan/Timeline

- Promotion and Tenue (P&T) Module shall be implemented by June 30, 2027, or as specified by the University at a later date.

- Work must commence within one month of contract signing. The platform shall be completed and fully configured, tested, and ready for deployment by January 28, 2028.

- Provide an implementation plan including what the offeror is responsible for and what the University is responsible for, with estimates of time.

  The timeline and plan should address, at a minimum, the following:

  - Development of a project plan.
  - Estimated implementation timeline (weeks/months)
  - Implementation methodology
  - Data migration support
  - Training provided
  - Documentation provided
  - Testing period
  - Go-live support

1.3.9 Section 9: Security Sufficiency Survey

Offeror must download and provide the University with the completed Educause Higher Education Cloud Vendor Assessment Tool (HECVAT). The current version can be found at: https://www.educause.edu/-/media/files/educause/hecvat/hecvat404.xlsx.

Learn more about HECTVAT may be found here: https://www.educause.edu/higher-education-community-vendor-assessment-toolkit

1.3.10 Section 10: Acknowledgement of Review of Contract Statement.

The University Contract for this Procurement will contain the provisions in Appendix C as well as any additional terms required by the University. By submitting a Proposal, the Proposer warrants that they have reviewed Appendix C and will execute a contract: a) in substantially the same form; and b) with these terms and conditions. The University will issue a purchase order in its financial system for accounting purposes only.

Proposers are to include a statement that the University's Contract terms and condition were reviewed and accepted (see the acceptable form in Appendix A).

Any exceptions to the Contract or terms and conditions are to be addressed and provided in this section of the Proposer's proposal/submission. Exceptions to the Contract shall not be made part of the Contract unless accepted and approved in writing by the University.

1.3.11 Section 11: Other Requirements and Forms.

1. **Acknowledgement of Receipt of Addenda Form (see Appendix A).**
   If any addenda to the RFP documents are issued prior to the due date and time for Proposals, this form must be completed, signed, and included in the Proposer's Technical Proposal.

2. **Duration of proposal offer:**
   Proposals are to be valid for a minimum of 180 days following the opening of the proposal. If an award is not made during that period, all offers shall be automatically extended for another 180 days, unless the contractor gives specific written notice to the Procurement Officer at least 15 days before the expiration of the then current 180 day period. Offers will be automatically renewed until such time as either an award is made or proper written notice is given to the University of Offeror's intent to withdraw its proposal. By submission of a proposal, each contractor guarantees that its offer shall be firm for the period specified above.

3. **Proposal Affidavit (see Appendix A).**
   Complete and sign the Proposal Affidavit and enclose with the Technical Proposal.

4. **Conflict of Interest Affidavit and Disclosure (see Appendix A).**

5. **Insurance.**
   Provide a copy of a Certificate of Insurance verifying your firm's Coverage for Professional Liability**,** Commercial General Liability, Workmen's Compensation, Automobile Liability Insurance, and Professional Liability that complies with the Insurance Requirements in the Sample Contract.

   If insurance is required by the University, the Contractor shall maintain, during the term hereof, Workmen's Compensation, Personal Injury and Property Insurance, and if the contract requires use of an automobile, Automobile Liability Insurance, in amounts required by statute. Contractor shall also require its subcontractors, if any, who enter

University premises to maintain such insurance. Contractor and its subcontractors shall furnish the University, upon request, with copies of policies or other satisfactory proof of insurance.

A. Insurance Requirements:

The Contractor shall defend, indemnify and save harmless the University System of Maryland, its officers, employees and agents, from any and all claims, liability, losses and causes of actions which may arise out of the errors, omissions and performance or non-performance by the Contractor, employees or agents, of the work covered by this contract. The University shall not assume any obligation to indemnify, hold harmless or pay attorneys' fees that may arise from or in any way be associated with the performance or operation of this agreement.

The Contractor shall secure, pay the premiums for, and keep in force until the expiration of this contract, including any renewal thereof, adequate insurance as provided below, such insurance to specifically include liability assumed by the Contractor under this contract. The amounts of insurance coverage specified below shall be the minimum amount of available insurance to satisfy claims; a policy which allows the costs associated with investigating, management or defense of any claim, or any other cost incurred by the insured or the insurance carrier, to be deducted from the policy limits is not acceptable.

- Commercial General Liability Insurance including all extensions-
  $2,000,000 each occurrence;
  $2,000,000 personal injury;
  $2,000,000 products/completed operations;
  $2,000,000 general aggregated

- Workmen's Compensation Insurance and Unemployment Insurance as required by the laws of the State of Maryland.

- Professional Liability Insurance, with a limit of not less than $1,000,000 per occurrence.

- If automotive equipment is used in the operation, automobile bodily injury liability insurance with limits of not less than $1,000,000 for each person and $2,000,000 for each accident, and property damage liability insurance, with a limit of not less than $2,000,000 for each accident.

- Products liability insurance, if not included in the Comprehensive, with limits of not less than $1,000,000 for each person and $2,000,000 for each accident.

- All policies for liability protection, bodily injury or property damage must specifically and expressly name the University System of Maryland as an insured with respect to operations under the contract and premises occupied by the

Contractor. With respect to the Contractor's liability for bodily injury or property damage under the items above, such insurance shall cover and not exclude Contractor's liability for injury to the property of the University System and to the persons or property of employees, students, faculty members, agents, officers, regents, invitees or guests of the University System.

- Each insurance policy shall contain the following endorsement: "It is understood and agreed that the Insurance Company shall notify the Procurement Officer in writing forty-five (45) days in advance of the effective date of any reduction in or cancellation of this policy." A certificate of each policy of insurance shall be furnished to the Procurement Officer. With the exception of Workmen's Compensation, upon the request of the Procurement Officer a certified true copy of each policy of insurance, including the above endorsement manually countersigned by an authorized representative of the insurance company, shall be furnished. A certificate of insurance for Workmen's Compensation together with a properly executed endorsement for cancellation notice must always be furnished. Following the notice of contract award, the requested Certificates and Policies shall be delivered as directed by the Procurement Officer. Notices of policy changes shall be furnished to the Procurement Officer.

- All required insurance coverages must be acquired from insurers registered to do business in the State of Maryland and acceptable to the University. The insurers must have a policyholders' rating of "A-" or better, and a financial size of "Class VII" or better in the latest edition of Best's Insurance Reports.

END OF TECHNICAL RESPONSE REQUIREMENTS

SECTION III.

Article 2. FINANCIAL PROPOSAL RESPONSE REQUIREMENTS
ONLY INVITED FIRMS

2.0 Financial/Price Proposal

2.1 SUBMISSION.

In accordance with the Evaluation Criteria, proposals that are not considered technically competitive may be eliminated from further review. The list of proposals that are within the competitive range may be developed based on the initial written technical proposals. All Proposers will be notified of the results as they pertain to their respective Technical Proposal.

Only proposals that are evaluated by the University's Evaluation Committee as being within the competitive range (the short list) will be requested to provide Financial Proposals.

Proposals are to be provided to the Issuing Office in accordance with the Solicitation Schedule. Submit Proposals using the following Bid Locker link :University of Baltimore: Secure Bid Submission - Bid Locker

Proposal documents are to be submitted as an attachment in PDF format (no zipped files). Hyperlinks to software products sent to the Issuing Office that indicate that the Proposal is posted by the Proposer on an electronic site may be rejected or considered non-responsive if contract terms and conditions (i.e., a Click-Through Agreement) are required to be accepted by the University in order to download the Proposal. By providing the Proposal to the University electronically, the Proposer grants the University the unlimited right to generate additional electronic and/or paper copies for distribution for the purposes of review, evaluation and archive.

The University may deem a submission non-responsive if received after the due date and time. The date and time of the submission is time stamped by the Bid Locker portal and shall be the official date and time of submission to Procurement.

Financial proposals shall remain in effect for a minimum period of 180 days following the Financial proposal opening date to allow for sufficient time for evaluation, approval and issuance of award notice. The University may modify the Financial Proposal Response Requirements at any time during the procurement process.

Proposers are to:

SUBMIT ONE PDF TITILED: "FIRM NAME __FINANCIAL PROPOSAL _UB-27-BK-10"

2.2 Financial Proposals. Also, see Appendix B for the Financial Proposal Form

Proposers must complete and submit the Financial/Price Proposal Form included in Appendix B.

If applicable, include your firm's payment schedule. Indicate what your pricing covers and billing expectations, if any. The University's intent is to evaluate the various pricing models and payment schedules and shall choose the most advantageous pricing proposal.

SECTION III

EVALUATION PROCESS

Article 3 INITIAL TECHNICAL EVALUATION AND SELECTION PROCESS

3.1 Evaluation Committee

All Proposals received by the closing deadline will be evaluated. The Procurement Officer shall establish an Evaluation Committee to review and rate the proposals. The Committee may request additional technical assistance from any source within the State.

3.2 Classification of Proposals

The Procurement Officer shall review each proposal for compliance with all necessary specifications and requirements of this RFP. Failure to comply with any specification or requirement may disqualify a firm's proposal. The term, “qualified firm” includes only those responsible firms that submitted proposals initially classified by the Procurement Officer as reasonably susceptible of being selected for award. The term does not include those firms that submitted proposals not reasonably susceptible of being selected for award or that are not deemed responsible.

The Procurement Officer shall have the sole authority to determine whether any deviation from the requirements of this RFP is substantial in nature. The Procurement Officer may waive or permit to be cured minor irregularities in a proposal, which are immaterial or inconsequential in nature whenever it is determined to be in the University's best interest.

3.3. Evaluation and Recommendation

The evaluation shall be based on the evaluation factors set forth in the RFP. Technical proposals and Financial Proposals shall be evaluated independently of each other. Firms are advised that for purposes of evaluation, technical merit is of greater importance than financial merit. Based on its evaluation of the technical and financial proposals, the Evaluation Committee will make a recommendation to the procurement officer for the award of the contract to the responsible offeror whose proposal is determined to be the most advantageous to the University, considering both technical and financial factors as set forth in the RFP.

UB may make any investigations as it deems necessary to determine the ability of Contractors to perform the work, and Contractors shall furnish UB all such information and data for this purpose as UB may request. The University reserves the right to take any or all of the following actions: to reject a proposal based on an unsatisfactory reference, to contact any person or persons associated with the referenced site, to request additional references or contact any known organization using the services supplied by the contractor or the contractor's subcontractors, to contact independent consulting firms for additional information about the contractor or the

contractor's subcontractors, and to have members of the Evaluation Committee visit any or all of the reference sites for demonstrations.

3.4. Technical Evaluation Criteria

The evaluation of proposals will be based on the criteria listed below. The criteria for the proposal evaluation are listed below in order of importance. Please see Section III, Article I for submission of information required in Firm's proposals.

The criteria that will be used by the committee for the technical evaluation of proposals for this procurement are listed below in descending order of relative importance (most important listed first):

- Ability to meet the required Scope of Services
- Company/Firm Profile
- Key Personnel, Team Leader/Team Member
- Other Services

The contractor's proposal is to state clearly that it meets the University's objectives; that is, that the contractor is fully capable of delivering the items and providing the services as specified in this RFP. Each contractor must provide a written detailed response to each response requirement.

Misinterpretation of specifications or requirements by the offeror shall not relieve the offeror of responsibility to accurately address the requirements of the RFP or to perform the contract, if awarded.

Proposals cannot be modified, supplemented, or changed in any way after the due date and time for proposals, unless specifically requested by the University.

3.5 In accordance with the Evaluation Criteria, proposals that are not considered competitive may be eliminated from further review. The list of proposals that are within the competitive range may be developed based on the initial written technical proposals. All Proposers will be notified of the results as they pertain to their respective Technical Proposal.

Only proposals that are judged by the University's Evaluation Committee as being within the competitive range (the short list) will be requested to provide Financial Proposals.

3.6 Interviews/Oral Presentations/Discussion Sessions

3.6.1 Purpose. Based on the Evaluation Committee's Initial Technical Evaluation, the University may invite, without cost to itself, the shortlisted Proposers to an oral presentation/discussion session ("Discussion Session").

The purposes of the sessions are as follows:

(i) To provide the Proposer/offeror the opportunity to demonstrate its product/services;
(ii) To discuss/clarify any and all aspects of the Technical Proposal, in particular the proposed Services/product, options, approach/methodologies, implementation process, schedule, staffing of the contract, and ongoing support and other applicable professional services;
(iii) To allow the University to meet the Proposer's key personnel, technicians and for these personnel to convey directly their experience and expertise in the proposed services/product and its implementation; and
(iv) To provide an opportunity to clarify the scope of services for the intended contract and discuss any items addressed in the Technical Proposal that may require additional clarification.

Firms shortlisted to Oral Presentations shall provide prior (date to be determined) to their Oral Presentations the information listed under (vi).

The University may request follow-up information if deemed necessary while reviewing the Offeror's submission. The University will provide short-listed firms with a date and time of when materials are due.

3.6.2 Format. The Oral Presentations will be informal, as the University is not interested in a sales presentation by executives and business development staff; rather, the University is requesting evidence of the Proposer's ability to meet the University's requirements and an interactive discussion with each of the shortlisted Proposers. It is important that those key personnel who are proposed to be assigned to the University fully participate in the presentation and discussion. Ample time will be available for the University and the Proposer to ask questions and discuss issues and concerns related to the product, the scope of the services, and the Proposer's capabilities and qualifications. We anticipate that the Discussion Session will be approximately 60-90 minutes in length, to be determined at a later date.

3.6.3 Date. The times and dates for the Oral Presentations, if any, will be set upon completion of the Initial Technical Evaluation. UBalt reserves the right to hold additional discussion or scope review interviews, if deemed necessary to evaluate a firm's qualifications and proposal.

3.7 Second Phase Technical Evaluation

3.7.1 Criteria. Following the Oral Discussion Session held with shortlisted Proposers (if such sessions were held), a Second Phase Technical Evaluation will be conducted. The Evaluation Committee will re-evaluate all criteria of the Technical Proposals of shortlisted Proposers, incorporating assessments of the Oral Discussion Session and outcomes of reference checks, if performed. The University reserves the right to make a determination that a Proposer is not shortlisted prior to completing reference checks.

3.7.2 Process. Further shortlists may result as the procurement progresses. At each phase of the process, those firms that do not remain shortlisted will not progress in the procurement. All

Proposers will be notified of the results of the Evaluation as they pertain to their respective Proposals.

At the sole discretion of UBalt, Proposers who have submitted Technical Proposals evaluated by UBalt to be viable and of further interest (i.e. "shortlisted") may be requested to provide UBalt additional technical information to further clarify the Contractor's technical qualifications. If additional information is requested of one or more Proposers, the Procurement Officer will so advise.

Once a final shortlist of proposals is established, the University will rank the technical proposals from highest to lowest.

The University may perform separate evaluation ratings and combine the evaluations as each phase is completed, or modify ratings (as applicable) for each phase/submissions of information to determine the final ranking.

The University may incorporate references prior to or after establishing the final shortlist of proposals. However, the University reserves the right to modify scoring if pertinent information regarding a Proposer's capability is obtained prior to an award. Once a final shortlist of proposals is established, the Committee will rank the remaining Proposals from highest to lowest.

Those Contractors that are not shortlisted will not progress in the procurement. Multiple shortlists may result as the procurement progresses.

SECTION III

ARTICLE 4 PRICE PROPOSALS AND FINAL EVALUATION PROCESS

4.1 Financial Evaluation

Financial Proposals will not be opened publicly. Financial Proposals will be evaluated based on financial/fees offered, financial return and other financial benefits to the University and its students and any investments and/or costs that may be required of the University.

In accordance with the Evaluation Criteria, proposals that are not considered technically competitive may be eliminated from further review. The list of proposals that are within the competitive range may be developed based on the initial written technical proposals. All Proposers will be notified of the results as they pertain to their respective Technical Proposal.

Only proposals that are judged by the University's Evaluation Committee as being within the competitive range (the short list) will be requested to provide Financial Proposals.

4.2. The Financial proposal

The Financial proposal shall cover all proposed services and tools required to meet the University's services and goals. Financial evaluations will be based on fees entered on Appendix B and must be signed by an individual authorized to bind the contractor and must include the contractor's name, typed or written legibly.

The University will establish a financial ranking of the proposals from lowest to highest total financial offers.

4.3. Discussions.

The University reserves the right to recommend an Offeror for contract award based upon the Offeror's technical proposal and financial proposal without further discussion. However, should the Committee find that further discussion would benefit the University and the State, the Committee shall recommend such discussions to the Procurement Officer. Should the Procurement Officer determine that further discussion would be in the best interest of the University and the State, the Procurement Officer shall establish procedures and schedules for conducting discussions and will notify responsible Offerors.

4.4. Best and Final Offers.

The Committee may recommend and the Procurement Officer may permit qualified Offerors to revise their proposals by submitting "Best and Final" offers when doing so is in the best interest of the University and the State. Multiple rounds of requesting "Best and Final Offers" may be conducted if necessary.

4.5 Final Ranking and Selection

Following evaluation of the technical proposals and financial proposals, the Evaluation and Selection Committee will make an initial overall ranking of the proposals and recommend to the Procurement Officer the award of the contract to the responsible Offeror whose proposal is determined to be the most advantageous to the University and the State of Maryland based on the results of the final technical and financial evaluation in accordance with the University System of Maryland Procurement Policies and Procedures. Technical merit may have greater weight than financial in the final ranking. The University is seeking the best overall value.

The contract award may be made to a proposal with a higher technical ranking even if its financial proposal is not the highest. Financial submissions may impact the award should the University receive proposals from vendors offering the same kind of technical capabilities and services. The decision of the award of the contract will be made at the discretion of the Procurement Officer and will depend on the facts and circumstances of the procurement. The Procurement Officer retains the discretion to examine all factors to determine the award of the contract. The goal is to contract with the Contractor that provides the best overall value to the University. Ultimately, the University is seeking the most advantageous proposal.

The University may select one or more Contractors to further engage in negotiations, including terms of a contract and other issues to be incorporated into the contract. The University reserves the right to make an award with or without negotiations.

Award of the contract may be subject to approval by the Maryland Board of Public Works.

4.6. Negotiations. The University may select for award one or more Proposer(s) to negotiate the terms and conditions of the Contract. The University reserves the right to make an award with or without negotiation**.** In the event negotiations between the selected contractor and the University fail to mutually agree on any terms and conditions, the University may rescind the award and conduct negotiations with the 2nd highest ranked firm/contractor. Additionally, if the Contractor fails to actively pursue the finalization and execution of the Contract, the University may rescind the Contract, at any time prior to the full execution of the Contract.

END OF SECTION III

ATTACHMENT A

COMPANY PROFILE FORM

COMPANY NAME:_____

ADDRESS OF COMPANY:_____

DATE OF INCORPORATION:_____STATE OF INCORPORATION:_____

PHONE NUMBER:_____TOLL FREE PHONE NUMBER:_____

FAX NUMBER:_____EMAIL ADDRESS:_____

FEIN NUMBER: _____
NUMBER OF GEOGRAPHIC LOCATIONS: _____

- # OF YEARS IN BUSINESS PROVIDING: Academic Faculty Management Platform Services

  # of years: _____

  Client/s and Location/s and Start and End date of Services: _____

- Three (3) different higher learning institutions an Academic Faculty Management Software Platform.
  1. _____(Start and End date of services)
  2. _____(Start and End date of services)
  3. _____(Start and End date of services)

Note: Clients named/provided in this form may be contacted for a reference.

OF YEARS IN BUSINESS UNDER PRESENT NAME: _____

OTHER OR FORMER NAMES UNDER WHICH YOUR ORGANIZATION HAS OPERATED:
_____

TYPE OF ORGANIZATION (I.E., CORPORATION, PARTNERSHIP, INDIVIDUAL, JOINT VENTURE):
_____

NAME OF PRINCIPAL(S) AND TITLE(S):
_____

BRIEF HISTORY OF COMPANY:_____

_____

BRANCH OFFICE	TOTAL COMPANY	WHICH WILL SERVICE UB:
Total Number of employees (Locally):		
Total Number of employees (Nationally)		

TOTAL COMPANY ANNUAL SALES VOLUME FOR ALL SERVICES:

2023_____ 2024_____ 2025 _____

ATTACHMENT B

Contractor Experience / Reference Form

Offerors shall provide references for at LEAST three (3) current clients indicating the Name of the contract, Contact name, address, phone number and email address. Indicate the contract term and contract value. UBalt may contact the references at any time during the procurement process and other known clients the Offeror provide services to. Ensure information provided demonstrates your firm meets the minimum qualifications.

Contract Name: _____ Contact Name: _____

Address: _____Phone: _____

Email address: _____

Term of Contract: _____ Value of Contract: _____

Firm's Assigned Key Personnel: _____

Contract Name: _____ Contact Name: _____

Address: _____Phone: _____

Email address: _____

Term of Contract: _____ Value of Contract: _____

Firm's Assigned Key Personnel: _____

Contract Name: _____ Contact Name: _____

Address: _____Phone: _____

Email address: _____

Term of Contract: _____ Value of Contract: _____

Firm's Assigned Key Personnel: _____

Contractor Experience / Reference Form

Offerors shall provide references for clients where services have been **terminated** in the past twelve (12) months indicating the Name of the contract, Contact name, address, phone number and email address. Indicate the contract term and contract value. Offeror's may include additional information in this section to support meeting the minimum qualifications.

Contract Name: _____ Contact Name: _____

Address: _____Phone: _____

Email address: _____

Term of Contract: _____ Value of Contract: _____

Contract Name: _____ Contact Name: _____

Address: _____Phone: _____

Email address: _____

Term of Contract: _____ Value of Contract: _____

Contract Name: _____ Contact Name: _____

Address: _____Phone: _____

Email address: _____

Term of Contract: _____ Value of Contract: _____

Contract Name: _____ Contact Name: _____

Address: _____Phone: _____

Email address: _____

Term of Contract: _____ Value of Contract: _____

Contract Name: _____ Contact Name: _____

Address: _____Phone: _____

Email address: _____

Term of Contract: _____ Value of Contract: _____

ATTACHMENT C

Key Personnel Form

Offeror's shall provide background and resumes for all UBalt account team members who will provide services to the University (must be a current, direct employee of Offeror). This form MUST be completed for EACH team member proposed under any resulting Contract.

1. PERSON'S NAME:_____

2. POSITION TO BE ASSIGNED:_____

3. CURRENT EMPLOYMENT WITH OFFEROR

   a. Dates of Employment:_____

   b. Positions Held/Duration by Date:

   _____

   _____

   c. Similar Experience [Note: these are to be references of other clients who have been served by the team member in the same role they would provide to the University, these are not employer references.]
      i. Organization name:_____
      Description of Services Provided:_____
      _____
      _____

      Contact Person:_____Phone:_____

      ii. Organization name:_____
      Description of Services Provided:_____
      _____
      _____

      Contact Person:_____Phone:_____

4. EDUCATIONAL BACKGROUND

   a. Education

Institution Degree/Diploma/Certificate Major (if any)

_____
_____
_____

   b. Professional Certificates/Licenses

Issuing Agency	Certification/License	Effective Date

c. Awards/Achievements/Other Notations (not required)

_____
_____
_____

END OF FORM