

# REQUEST FOR PROPOSAL

RFP Number: RS4938-AR-Rebid  
Date: October 9, 2009  
Due Date: November 6, 2009  
by 4:30 p.m.

If further information is required, please contact:  
Randall Stoskopf at: Phone: (805) 893-3001,  
Fax: (805) 893-8639, or e-mail at:  
Randall.Stoskopf@purc.ucsb.edu

**RETURN FIVE COPIES TO:**  
**UNIVERSITY OF CALIFORNIA**  
**PURCHASING DEPARTMENT**  
**6950 HOLLISTER AVENUE #100**  
**GOLETA, CA 93117-5824**

Any deviation from the specifications must be identified and fully described. The right is reserved to accept or reject proposals on each item separately, or as a whole, and to waive any irregularities in the proposal. If unable to provide a proposal, please return this form so marked.

**BIDDER IS REQUIRED TO SUBMIT FIVE (5) COPIES OF THIS REQUEST FOR PROPOSAL BY DUE DATE AND TIME LISTED ABOVE. EACH COPY TO INCLUDE A COMPLETED REQUEST FOR PROPOSAL FORM AND ALL ADDITIONAL EXHIBITS AND INFORMATION AS REQUIRED FOR UNIVERSITY EVALUATION.**

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Please submit your proposal to provide financial products and services to the Santa Barbara campus of the University of California (UCSB) Alumni Association that will provide the maximum benefit to the UCSB Alumni Association in terms of services to alumni, students, faculty and staff, as well as revenue to the UCSB Alumni Association, in accordance with the attached specifications and proposal requirements.

**Confidentiality:** Final proposals are public information, however, the contents of a proposal which discloses any aspect of a vendor's proposal, shall be held in confidence until notice of award has been made. Proprietary data, properly identified by the vendor will be held in strict confidence where there is no violation of public disclosure laws.

The terms and conditions of Appendix A, University of California Terms & Conditions of Purchase shall apply. Appendix 'A' may be viewed at: [www.purchasing.ucsb.edu](http://www.purchasing.ucsb.edu) under the heading of "Quicklinks" on the UCSB Purchasing Website homepage. Click on the link for "Bus-43" listed under "Policies and Procedures" and click on "Exhibit C, Appendix A".

Bidder certifies neither bidder, bidder's close relative nor bidder's employees are employed by the University (compensatory or otherwise).

Signature: \_\_\_\_\_

The award decision shall be in its best interest of the University and its judgment shall be final.

**Basis for Award:**

Proposals will be evaluated on the basis of the following evaluation criteria:

- 1.) Amount of Upfront Payment
- 2.) Total Value of Agreement
- 3.) Service to Alumni Association
- 4.) Experience in Industry
- 5.) Vendor's Financial Soundness
- 6.) Privacy Protections
- 7.) Value of Service to Alumni

For questions or additional information regarding the requirements of this Request for Proposal, contact: George Thurlow, Executive Director, UCSB Alumni Association at: [george.thurlow@ia.ucsb.edu](mailto:george.thurlow@ia.ucsb.edu)

Bidders must submit five (5) complete copies of their RFP response as follows:

Return RFP responses to the UCSB Purchasing Department by the required due date and time via standard U.S. mail or overnight-mail service to the Purchasing Dept. address on page one (1) of this Request for Proposal. A signed and dated "Request for Proposal" form (2 pages) must be submitted to the Purchasing Dept. with an original ink signature.

As a supplier of goods or services to the University of California I/we certify that racially segregated facilities will not be maintained nor provided for employees at any establishment under my/our control and that I/we adhere to the principles set forth in Executive Orders 11246 and 11375, and undertake specifically: to maintain employment policies and practices that affirmatively promote equality of opportunity for minority group persons and women; to take affirmative steps to hire and promote women and minority group persons at all job levels and in all aspects of employment; to communicate this policy in both English and Spanish to all persons concerned within the company, with outside recruiting services, and the minority community at large; to provide the University on request a breakdown of our total labor force by ethnic group, sex, and job category; and to discuss with the University our policies and practices relating to our affirmative action program.

I certify that I am authorized to sign on behalf of the organization I represent for this offer, and agree to all terms and conditions described herein.

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Telephone No. (with area code)

\_\_\_\_\_  
Fax No. (with area code)