

# REQUEST FOR PROPOSAL

RFP Number: RS5109-ER  
Date: October 30, 2009  
  
Due Date: November 18, 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

[Empty dashed box for stamp or signature]

**RETURN TWO 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 quote, please return this form so marked.

**BIDDER IS REQUIRED TO SUBMIT TWO (2) COPIES OF THIS PROPOSAL BY DUE DATE AND TIME LISTED ABOVE. EACH COPY TO INCLUDE A COMPLETED REQUEST FOR PROPOSAL FORM AND ANY ADDITIONAL INFORMATION OR DEVIATIONS NOTED, AS REQUIRED FOR UNIVERSITY EVALUATION.**

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Please submit your proposal and lowest quotation for the University of California, Santa Barbara campus (UCSB), Accounting & Financial Services Department in accordance with the attached Scope of Work and requirements for an Electronic Data Management System capable of meeting the long-term needs of the UCSB Accounting Services & Controls (AS&C) department's operations.

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".

Are the prices you have quoted herein the lowest offered to any Federal, State, Municipal or similar Institution account, under similar circumstances? YES\_\_\_\_ NO\_\_\_\_ If NO, please explain.

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

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

Cash discount of \_\_\_\_\_ percent for a payment within \_\_\_\_\_ days from receipt of goods or Invoice, whichever is later. The University cannot consider cash discounts of less than 20 days.

All prices to be quoted F.O.B. Destination.

BASIS FOR AWARD:

- Scanning Capability (SC)
- Repository Management (RM)
- Workflow (WF)
- Installation/Security/Integration (ISI)
- Other (O)
- Demo (D)
- Overall Impression (OAI)

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

Proposals will be evaluated on a cost-per-quality weighted point basis. For the determination of quality points, a rating scale has been developed by UCSB which takes into account the evaluation criteria listed in the attached "Selection Criteria". Each evaluation criteria is assigned a weighted value (quality points), the total available points being 4,300. The number of quality points assigned to each evaluation criteria is dependent upon the relative importance of that criteria to the University. To determine the lowest cost-per-quality point, each bidder's proposed total cost will be divided by the total quality points awarded to that particular bidder's proposal. The bidder with the lowest cost-per-quality point will be awarded the order.

For additional/technical information or questions regarding this RFP, contact Doug Drury in the UCSB Information Systems Office at (805) 893-5036, or by e-mail at: [Doug.Drury@isc.ucsb.edu](mailto:Doug.Drury@isc.ucsb.edu)

Bidders must submit two (2) complete copies of their RFP response as follows:

Return RFP responses to the UCSB Purchasing Department by the required due date and time to the UCSB Purchasing Department via either 1.) e-mail attachment to: [randall.stoskopf@purc.ucsb.edu](mailto:randall.stoskopf@purc.ucsb.edu) OR 2.) by standard U.S. mail or overnight-mail service to the UCSB Purchasing Department to the 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 Department by mail, or e-mail attachment.

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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.

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Authorized Signature

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Date

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Telephone No. (with area code)

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FAX No. (with area code)