



## **Request for Proposals (RFP)**

**No. RFP UB-25-BK-18**

***FOR***

## **Adult Learner Recruitment Services**

**ISSUE DATE: May 30, 2025**

### **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](mailto:bvukirk@ubalt.edu)

and

Adrienne Smith, Contract Specialist  
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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. This is a courtesy, 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 website for all documents relating to this RFP. Visit: <http://www.ubalt.edu/about-ub/offices-and-services/procurement/information-for-merchants/current-ub-solicitations.cfm>

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## **SOLICITATION SCHEDULE**

Issued Date:	May 30, 2025
Pre-Proposal Conference - Virtual:	June 4, 2025, at 10:30 AM ET
Last Day for Questions:	June 11, 2025, at 12:00 PM ET
Responses to Questions by:	COB June 16, 2025
Technical Proposal Due Date: ET	June 23, 2025, at 12:00 PM
Virtual Oral Presentation/Discussion Session(s): For invited shortlisted firms only	July 9-10, 2025 (Projected)
Financial and Price Proposal Due Date (Projected):	July 21, 2025, at 10:00 AM ET (Invite Firms Only)
Contractor(s) Selection Anticipated to be finalized:	August 4, 2025 (Projected)
Contract Commencement:	January 1, 2026 (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

#### 1.1 OBJECTIVE.

The University of Baltimore (UBalt) is soliciting proposals from qualified professional firms for **adult learner and graduate enrollment recruitment services**. The purpose of this Request for Proposal (RFP) is to select from among competing proposals that have successfully provided services to increase the number of academically eligible prospective students that the University, Enrollment Management team can recruit to attend UBalt. The University seeks a Contractor that has a proven record of assisting educational institutions in positively increasing prospects and applications, during each year of their contract. Proposals will be independently evaluated and ranked considering all the specifications contained herein.

The work to be performed under this proposal shall be provided by fully trained and experienced professionals to perform a complete and acceptable job to the satisfaction of the University of Baltimore's representative. 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.

Our campus comprises 11 acres in the heart of midtown Baltimore near Penn Station. UBalt's campus includes eight main buildings plus structured parking totaling approximately 1 million square feet. In addition, UBalt owns ancillary buildings near campus and several small parking lots. UBalt is a non-residential campus as most of our students are older, working adults.

In fall 2024, UBalt enrolled 2939 students; 1,184 undergraduates, 1,029 graduate students, and 726 law school students.

As the University celebrates its 2025 centennial, we strive to build upon our legacy and leverage our strengths to forge a bold future. UBalt's strategic goals, as described in UBalt's strategic plan are:

1. Position UBalt as the region's premier professional, career-focused university
2. Strengthen student success
3. Solidify UBalt's commitment to community engagement and service
4. Organize for long-term financial stability
5. Achieve excellence in research, scholarship and creative activity
6. Strengthen UBalt's commitment to providing educational opportunities for students regardless of race, ethnicity, gender identity, disability, or economic status.

By design, UBalt serves a nontraditional population:

- The majority of UBalt students are enrolled in graduate programs.
- Nearly all our undergraduate students enroll at UBalt after completing credits elsewhere including those who have completed community college programs.
- The average age of our undergraduate students is 27.
- Our overall student population is 57 percent minority.
- Our student population is evenly divided between full-time and part-time students.
- The majority of our undergraduate students are first generation students and/or high financial need students as determined by the U.S. Department of Education.
- UBalt has been designated by the U.S. Department of Education as a Predominantly Black Institution (PBI), the only four-year university in Maryland with this designation and one of approximately 67 nationwide.
- Our campus is oriented toward the needs of our non-traditional, career-oriented students, and therefore, does not provide residence halls, meal plans, intercollegiate athletics, or fraternities or sororities.
- UBalt delivers instruction and services in a flexible environment with in-person, virtual/online, and hybrid modalities to suit our older, non-traditional student populations. The University has a long tradition with the combination of in-person and online instruction; we were the first in the country to offer a fully online MBA program accredited by AACSB International.
- UBalt students are highly successful, as demonstrated by UBalt's ranking as
- **#1** public master's university in Maryland for graduates' earning performance 9 years after entering college (2024), Washington Monthly. With nearly a century of success as the career-minded, city-focused institution for Baltimore and the region, the University is determined to build on its success. UBalt is well positioned for the changes underway in higher education. And we are committed to our continuing role as an anchor institution in Baltimore, contributing in meaningful ways to the surrounding community. UBalt is not only the University **of** Baltimore, but also the University **for** Baltimore.

For more information about UBalt, visit <http://www.ubalt.edu> and take a virtual tour by clicking on the link below:

[https://www.youvisit.com/tour/ubalt/ubalt?tourid=tour1\\_09\\_21\\_22\\_89879](https://www.youvisit.com/tour/ubalt/ubalt?tourid=tour1_09_21_22_89879)

### **1.3 ISSUING OFFICE.**

Beth Vu Kirk, Director of Procurement  
University of Baltimore  
Office of Procurement  
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[bvukirk@ubalt.edu](mailto:bvukirk@ubalt.edu)

and

Adrienne Smith, Contract Specialist  
University of Baltimore  
Office of Procurement  
1420 N. Charles Street, Baltimore, MD 21201

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 A. 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.

- The contractor shall have a minimum of five years experience in higher education recruitment services.
- The contractor shall have a minimum of five years recruitment experience with graduate, adult, and degree completer transfer students.
- The contractor has provided at minimum of five years on-going marketplace assessments and trend analyses.

### **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 relative 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: [RFP Questions](#)

## **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 digital list of Current Solicitations.

### [Current UBalt Solicitations](#)

Interested Offerors are solely responsible for checking the website 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.**

There will be a **virtual** Pre-Proposal Conference held in conjunction with the RFP. Attendance at the Pre-Proposal Conference is not mandatory.

The conference will be held via Microsoft Teams. The purpose of this preproposal conference is to review only the RFP documents. A list of the attendees will be shared via an Addendum.

If your firm is interested in attending the Virtual Pre-Proposal please click on the link provided to register (see below) by June 3, 2025, 1:00 PM ET.

[Pre-Proposal Conference Registration](#), a link to attend will be provided at a later date (by 4:00 PM June 3, 2025) to registered attendees. If your firm registered and did not receive the link by 4:00 PM ET, June 3, 2025, contact the Issuing Office, late registrations or failure to contact the Issuing Office with reasonable advance notice may impact the Issuing Office's ability to provide the link prior to the Pre-Proposal. The duration shall be one hour. A list of attendees (firms) shall be shared via an Addendum

Potential Proposers /Offerors may visit our campus, official tours will not be held.

Click here to view UBalt's [Campus Map](#)

During the pre-proposal conference answers may not be immediately available for complex questions. Questions received will be shared/provided in writing, however, interested offerors are responsible for ensuring their questions are provided in writing and responded to in writing by the due date. ONLY written questions and responses shall be incorporated into the RFP via an Addendum.

The Pre-Proposal Conference is subject to change. Proposers are advised to visit the University's Procurement website daily for the most updated information.

**SPECIAL ACCESS:** Any attendees requiring special assistance in attending the Pre-Proposal, should contact the Issuing Office within 5 business days prior to the Pre-Proposal date.

## **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 in digital format, as well as transactions, and communication, in specified format, are permitted for this procurement. 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 shall 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 one (1), two (2)-year renewal.

**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 a 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).**

An MBE goal is 5% under this RFP.

Minority participation is important to UBalt and the State of Maryland. State-certified Minority Business Enterprises (MBE) are strongly encouraged to respond to this solicitation notice. If not certified by the Maryland Department of Transportation (MDOT), MBEs are encouraged to initiate certification as soon as possible. For more information on the State's MBE program or questions related to certification, please contact MDOT's Office of Minority Business Enterprise/Equal Opportunity, telephone 800-544-6056 or view the MDOT website <http://www.mdot.state.md.us/mbe/index.html>.

#### **Liquidated Damages.**

The contract requires the contractor to comply in good faith with the Minority Business Enterprise ("MBE") Program and contract provisions. The State and the Contractor acknowledge and agree that the State will incur damages, including but not limited to loss of goodwill, detrimental impact on economic development, and diversion of internal staff resources, if the Contractor does not comply in good faith with the requirements of the MBE Program and MBE contract provisions. The parties further acknowledge and agree that the damages the State might reasonably anticipate to accrue as a result of such lack of compliance are difficult to ascertain with precision. Therefore, upon issuance of a written determination by the State that the Contractor failed to comply in good faith with one or more of the specified MBE Program requirements or contract provisions, the Contractor shall pay liquidated damages to the State at the rates set forth below. The Contractor expressly agrees that the State may withhold payment on any invoices as set-off against liquidated damages owed. The Contractor further agrees that for each specified violation, the agreed upon liquidated damages are reasonably proximate to the loss the State is anticipated to incur as a result of such violation.

A. Failure to submit each monthly payment report (or as requested by the University) in full compliance with COMAR

21.11.03.13B (3): **\$100.00** per day until the monthly report is submitted as required.

Failure to include in its agreements with MBE subcontractors a provision requiring submission of payment reports in full compliance with COMAR

21.11.03.13B (4): **\$100.00** per MBE subcontractor.

B. Failure to comply with COMAR 21.11.03.12 in terminating, canceling, or changing the scope of work/value of a contract with an MBE subcontractor and/or amendment of the MBE participation schedule: the difference between the dollar value of the MBE participation commitment on the MBE participation schedule for the specific MBE firm and the dollar value of the work performed by that MBE firm for the contract.

C. Failure to meet the Contractor's total MBE participation goal and subgoal commitments: the difference between the dollar value of the total MBE participation commitment on the MBE Participation Schedule and the MBE participation actually achieved.

D. Failure to promptly pay all undisputed amounts to a subcontractor in full compliance with the prompt payment provisions of the Contract **\$100** subcontractor is paid per day until the undisputed amount due to the

Notwithstanding the use of liquidated damages, the State reserves the right to terminate the contract and exercise all other rights and remedies provided in the Contract or by law

**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.**

An offeror may provide multiple proposals. Any single offeror may present **up to two** separate proposals (but not more than two). Each proposal should be complete, and respond to all the requirements of the RFP. If multiple proposals are offered, they should be clearly identified, including identification in page headers or footers to avoid confusion, and submitted separately as two separate submissions, via the link/s provided.

Each proposal will be independently evaluated. The University will rate and rank proposals deemed susceptible of receiving an award in accordance with its evaluation of the proposal content.

**END OF SECTION I**

## **SECTION II.**

### **SCOPE OF SERVICES**

#### **2. Overview.**

This Request for Proposals (RFP) is issued for the purpose of soliciting responses from qualified, responsible, and experienced companies to provide enrollment recruitment services for the University of Baltimore.

UBalt intends to select a firm that shall assist the University to identify and increase the number of academically eligible students that the University's Enrollment Management team can recruit to attend UBalt. The University seeks a Contractor that has a proven record of assisting Clients/University's in positively increasing applications, during each year of their contract.

#### **2.1. Enrollment Recruitment Services.**

The Contractor's ("Partner") services shall include but may not be limited to:

##### **A. Coordination of Service.**

- The Contractor shall provide a team led by a strategic leader to UBalt, who with UBalt will manage the services and establish program development and management across academic programs. The strategic leader will serve as the UBalt primary point of contact.
- As needed and requested by UBalt, the Contractor shall travel to UBalt's campus as well as host UBalt staff at Partner's premises, to the extent permissible by the State of Maryland's policies and procedures, to provide professional development opportunities and to understand and effectively use the services provided under the Agreement.
- The Contractor shall monitor and coordinate the following services with UBalt:
  - Delivery of on-going marketplace assessments and trend analyses on both market research as well as market observation.
  - Identify emerging trends to keep UBalt and internal teams current regarding the opinions, attitudes and perceptions, priorities, and behavioral intentions of graduate prospects and adult learners.
  - Provide audience recommendations for optimal results (including, as applicable, list recommendations and list order placement)
  - Create marketing strategies and develop creative assets for multi-channel marketing campaign to include (but not limited to):

- Delivery of customized marketing strategy for graduate, adult, transfer/degree completers based on current research and data.
- Development and hosting of dynamic, responsive UBalt landing pages hosted by Partner
- Design and deployment of strategic email campaigns, coordinating with UBalt's campaigns
- Design and deployment of digital advertisements through channels such as Facebook, Instagram, LinkedIn, and Google
- Design, production, and deployment of printed materials
- Provide data-driven campaign reporting, analysis, and optimization recommendations.
- Describe data exchange processes and tools utilized.
- On-going refinement of campaign strategy based on performance monitoring and assessments
- Recurring, on-going reporting as well as detailed interim and final analysis
- Use of Contractor's proprietary methods and systems

**B. Program Services.**

**Prospective Student Recommendations.**

- The Contractor shall describe tools and/or processes they will utilize to analyze UBalt's historical student populations and consumer variables to isolate and prioritize relevant demographic and psychographic variables. The Contractor shall develop customized and unique student profiles that include analyses of historical student population, discoverable consumer variables, and developed insights.
- The Contractor shall expand the number of prospective students and applicants who match UBalt's unique characteristics as identified by customized student profiles, to include the following students when applicable:
  - The Contractor identifies prospective students whose achievements, characteristics, and prior actions make them a strong potential match for UBalt's academic programs.
    - Those who have previously expressed an interest in UBalt's graduate and transfer academic programs.
    - Prospective students whose information is newly available from list sources
    - Those who did not respond to prior search initiatives when previously contacted

- Relevant (or young alumni) alumni and current undergraduate seniors
- First-party digital audiences, internal prospective students whose information gathered and profiled from UBalt’s website visitors, online events (University-wide or admission orientated), feedback, social media connections, email engagement, etc.

**C. Marketing Strategy.**

- The Contractor shall identify and launch multichannel digital marketing campaigns to build awareness of and encourage engagement with UBalt, including (but not exclusive to):
  - Multichannel digital campaigns including Facebook, Instagram, LinkedIn, and Google Ads inclusive of display advertisement that includes a flighting strategy aligned with organizational goals and funding.
  - Manage and determine the number of Paid Search Google Ads campaign, to include analyzing the campaigns, creating ads, and reviewing the budget ensuring it’s utilized efficiently.
  - Provide regular campaign reporting and analyses and indicate strategies to pivot as necessary.
- The Contractor shall launch multichannel campaigns to facilitate consideration and decision-making to include:
  - Identify, develop and host responsive landing pages to support prospective student engagement and management.
  - Identify what landing pages they will develop to move students through the prospect and application stages, strategies, and site-based campaigns.
  - Describe how they will develop responsive email campaigns that include strategies, a timeline, and identification of each period of marketing.
  - Determine and indicate how many customized content copy emails they will deliver and under what circumstances.

**D. Organic Lead Generation Strategy.**

The Contractor will provide an UBalt SEO (Search Engine Optimization) on UBalt.edu and provide UBalt with results and recommendations to improve the quality and quantity of UBalt website traffic to UBalt’s pages, ensuring these students can find relevant information organically.

**E. Yield Strategies.**

The Contractor shall identify strategies they will develop and deploy to improve yield, and processes that assist in narrowing down those most likely and not likely to enroll.

The contractor shall provide tools that will help improve yield rates of: admit to commit and commit to registered. The tool should provide, and rate student enrollment plans from already enrolled to “no, not coming.” Admissions counselors will have easy access to the data to monitor their students, and prioritize engagement. The contractor will provide training and professional insight on the most effective way to utilize the data to increase enrollment.

**F. Professional and Adult Student Research and Training Services.**

The Contractor shall address the strategic challenges related to designing, positioning and delivering flexible, innovative educational offerings for the working adult, graduate and degree completers. The Contractor will provide research and training to UBalt administration, faculty and staff as needed and requested to include:

- Provide a Strategic Leader—A staff member who will serve as primary point of contact and will facilitate service utilization and dissemination of services and resources.
- Provide Annual Professional Development Webinars
- Provide Annual Marketing & Recruiting Intensive Workshops
- Provide Diagnostic and Implementation Resources
- Provide competitive market reports and recommendations for graduate education, specific academic programs, and Enrollment Management
- Provide Organizational Benchmarking and Strategy Consults
- Provide Institutional-Specific Research
- Provide On-demand, online availability of Adult and Graduate Student Research

**G. Data-Driven Campaign Reporting, Analysis, and Optimization Recommendations.**

- **The Contractor will provide online access to campaign performance data:** Access to campaign performance data by segment from desktops, laptops and/or portable devices, enabling the UBalt user to filter key performance data by demographic, providing detailed insights into campaign performance by segment. KPIs tracked to optimize recruitment strategy and provide ultimate transparency and reporting on marketing investments.
- **The Contractor will provide campaign performance monitoring:** Ongoing evaluation of email deliverability, email open data, testing of email response preferences, and on-going associated adjustments, as well as coordination with digital marketing and in-home paper delivery, that will allow for maximum



campaign adjustments and performance. Digital marketing campaigns will include ongoing monitoring across channels and campaigns to identify opportunities for optimization and reallocation of marketing spend. Using best available data from UBalt, the Contractor will collaborate with UBalt to analyze and report on the campaign contribution on enrollment outcomes.

- If an application is developed and hosted by Contractor, then during the term of this Agreement, the successful partner will provide a UBalt specific online tool for program reporting and analysis for the application process as part of the student journey.

#### **H. Paid Media Accounts.**

To the extent applicable, UBalt will establish the following social media accounts as soon as practicable following the Program Term(s) and grant contractor access to such account as set forth by the contractor below (each, a “Social Media Account” and collectively, the “Social Media Accounts”).

<b>Channel or Platform</b>	<b>Access Requirements</b>
Facebook	Assign as a Facebook Page Admin Add as a partner and grant Leads Access Permissions for direct access inquiries generated from Facebook Lead ads
LinkedIn	Assign as a LinkedIn page Admin Grant “Sponsored Content Poster” and “Lead Gen forms Manager” permissions to create ads and to assess inquiries generated from LinkedIn LinkIn Lead Form ads
Google Analytics	Provide with “Read and Analyze” access to our .edu Google Analytics account (the property level) to provide insight into campaign analysis and performance
Other social media accounts as mutually agreed upon by the Parties	As determined by UBalt at a later date during the live of the awarded contract.

For the avoidance of doubt, the Contractor shall have advertising access to each Social Media Account but shall not be responsible for posting content organically to any Social Media Account.

Upon UBalt’s approval the Contractor will add the pixels to Organization’s applicable landing pages as outlined by contractor below: 1

Upon UBalt’s approval the Contractor may implement enhanced conversions on the UBalt's applicable landing pages, as described .

## **I. Data and Technical Specifications.**

**General Requirements:** The Contractor shall provide UBalt with the services outlined above in a timely and accurate manner and will identify the data and technical requirements UBalt must deliver on specified timelines.

**Program Data Requirements:** The Contractor shall outline the data file transmission process and expectations from UBalt.

**Data Integration Services:** The Contractor shall outline the data integration services they provide and expectations from UBalt.

**Implementation Support:** The Contractor shall outline what implementation support they will provide to UBalt.

**Institution Support Requirements:** If applicable, the Contractor shall provide UBalt with Data Integration Services at no additional cost.

**Data Access Permissions:** UBalt will coordinate the delivery of all confidentiality agreements, data use agreements, or similar agreements required by UBalt’s source system vendor(s) to permit selected vendor access to interact with UBalt’s source system(s) and deliver appropriate data feeds to the selected partner.

**Data Return:** The Contractor shall have their own SFTP host in order to consume data back to their campus via an automated feed. If Partner does not wish to provide with an SFTP, the data can be downloaded manually from the Partner portal.

### **System Conversions, Upgrades and Other Changes:**

The Contractor shall provide program fees based on UBalt’s current source system(s), for any system conversions and/or material upgrades that impact integration points such as web-service APIs that require reprocessing, remapping and revalidation of data.

## **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 Team Dynamix link [Proposal Submission](#).

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 Team Dynamix link 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 TITLED: “*FIRM NAME\_TECHNICAL PROPOSAL*”**

##### 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 the response requirements Sections and sub-sections (Section 1-11) as provided below.

#### 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.**

**a. Company Background.** Provide your qualifications and experience in providing adult learner recruitment services. Describe your experience serving public Universities/colleges.

**b. Client List.** Provide a complete adult learner/graduate client list that includes length of service, sales volume/contract value, and the name and telephone number of the college/university administrator responsible for your firm's services. Identify clients similar to UBalt.

**c. Discontinued Client List.** Provide a list of all college/university adult learner/graduate accounts that were canceled or not renewed during the past five years, including the reason for termination. Include length of service, the name and telephone number of the college/university administrator your firm worked with during your services.

**1.3.5                      Section 5:                      Key Personnel, Team Leader/Team Members**

**a. Company Organization Chart.** Provide your company organization chart.

**b. Resumes.** Provide resumes for all team members. Identify the Team Leader and other Team members that shall be assigned to UBalt's account. Describe their role and duties and responsibilities.

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 RFP 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.

**Section 6: Scope of Services.**

Explain how your firm shall manage, strategize, and perform the Scope of Services described in this RFP and listed below. Divide your Section 6 into the sub-sections (6.1-6.10) listed below.

- 6.1     Enrollment Recruitment Services
- 6.2     Program Services
- 6.3     Marketing Strategies
- 6.4     Organic Lead Generation Strategy
- 6.5     Paid Lead Generation Strategy

6.6 Yield Strategies, responses must include but is not limited to include the following information:

- Describe the tools that will help improve yield rates of: “admit to commit” and “commit to registered”. The tool should provide, and rate student enrollment plans from already enrolled to “no, not coming”.
- Explain how UBalt’s Admissions counselors will have easy access to the data to monitor their students and prioritize engagement.
- Explain how your firm will provide training and professional insight on the most effective way to utilize the data to increase enrollment.

6.7 Professional and Adult Student Research and Training Services

6.8 Data-Driven Campaign Reporting, Analysis, and Optimization Recommendations

- Proposer must include in their response with a detailed explanation of how your firm will increase applications by 5% and how your firm will increase it year after year at least 5%. Describe in detail your approach/plan.
- Provide three client examples that demonstrate your firm has increased clients’ applications and year after year increases.
- Provide examples to demonstrate how your firm adjusted/strategize from not achieving planned growth.
- Explain unforeseen environmental circumstances that contributed to not being able to meet planned growth.

6.9 Paid Media Accounts

Proposers must include your firm’s level of access for each media account.

Also, see UBalt’s Access Requirements provided in the Scope of Services.

6.10 Data and Technical Specifications

## **Section 7: Other Services.**

UBalt strongly encourages Proposals that include any additional products or services that can be offered to enhance value to the University.

Offerors may include in this section additional services that are not captured in Section 6, other services may include but are not limited to:

- Best Practice Research
- Summary Briefs
- Access to successful partner experts
- Annual Professional and Adult Education strategic planning meetings and workshops

#### **Section 8: Implementation Plan.**

Describe the process used to implement the contracted services, including any customization or transition period that will be required. Provide a listing of events and timeframes for accomplishing the implementation. Please note, that the awarded vendor will be required to work with existing tools employed by the University. The University currently has a CRM (Salesforce) tool and digital communications platform (TargetX Campaign Builder for emails) already in place. Currently the University uses Salesforce/Target X and PeopleSoft to share data, the University anticipates using these tools with the awarded contractor. Data shared may include but is not limited to; enrollment related demographics and enrollment statuses across the admission funnel. PeopleSoft is primarily used for, demographics and admission statuses. Salesforce/TargetX data include prospect information (contact info and academic interests).

Proposers are to provide within your submission under this Section 8, how your company can contribute to a smooth process with respect to experience using the University's current software and tools, and other tools/software your firm will use/deploy to implement your services and to achieve the recruiting results UBalt seeks.

#### **Section 9: Measurements and Reports.**

Describe your methods for measuring effectiveness through employment of your solution. Describe reports, dashboards and other metrics that will be available and/or provided to the University.

#### **1.3.6 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.**

**1.3.7 Section 11: Other Requirements and Forms.**

**1.3.8. 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.

**1.3.9 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.

**1.3.10 Proposal Affidavit (see Appendix A).**

Complete and sign the Proposal Affidavit and enclose with the Technical Proposal.

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

**1.3.12 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 Team Dynamix link [Proposal Submission](#).

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 Team Dynamix link 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 TITLED: “FIRM NAME\_FINANCIAL PROPOSAL”**

**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.

Please provide a pricing schedule for your firm’s services. Indicate what your pricing covers and billing expectations, if any. Offerors may include various pricing schedules and options. The University’s intent is to evaluate the various pricing schedules/models and choose the vendor(s) that can best meet our needs.

## **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
- Implementation Plan
- 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.
- (v) Provide Technology Requirements:
  - 1. The Educause Higher Education Vendor Cloud Assessment Tool (HECVAT). This must be the "HECVAT FULL 3.x" version of the tool and submitted in the original Excel spreadsheet format. The HECVAT may be downloaded from here: <https://www.educause.edu/-/media/files/educause/hecvat/hecvat403.xlsx>
  - 2. Their SOC 2/Type 2 report and/or ISO 27001 certification if available.
  - 3. Certification of PCI compliance
  - 4. Requirements for on-premises network device local and Internet connectivity.

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

Items #1 & #2 relate the Offeror's cloud services, 4 relates to Offeror's on-premises requirements, and item #3 relates to cloud and on-premises. The requested information shall be evaluated and may be incorporated into the Offeror's overall technical ability to meet the University's technology and security requirements. Section vi (Technology Requirements) must be provided as a separate submission from the Oral Presentation materials. The Technology submission (vi) will not be discussed during Oral Presentations; however, 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 2<sup>nd</sup> 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: student recruitment services (higher education).

# of years: \_\_\_\_\_

Client/s and Location/s and Start and End date of Services: \_\_\_\_\_

- # OF YEARS IN BUSINESS PROVIDING: recruitment experience with graduate, adult, and degree completer transfer students.

# of years: \_\_\_\_\_

Client/s and Location/s and Start and End date of Services: \_\_\_\_\_

- # OF YEARS IN BUSINESS PROVIDING: on-going marketplace assessments and trend analyses.

# of years: \_\_\_\_\_

Client/s and Location/s and 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: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

<u>BRANCH OFFICE</u>	<u>TOTAL COMPANY</u>	<u>WHICH WILL SERVICE UB:</u>
----------------------	----------------------	-----------------------------------

Total Number of employees (Locally):	_____	_____
--------------------------------------	-------	-------

Total Number of employees (Nationally)	_____	_____
---	-------	-------

TOTAL COMPANY ANNUAL SALES VOLUME FOR ALL SERVICES:

2022 _____	2023 _____	2024 _____
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