



Request for Proposals
Solicitation #UB-25-SB-22
for
Course Evaluation Software Services

ISSUE DATE: June 27, 2025

ISSUING OFFICE:

UNIVERSITY OF BALTIMORE

Office of Procurement

1420 N. Charles Street, Baltimore, MD 21201

Stacey Brooks, Contract Specialist

Email: sbrooks@ubalt.edu

and

Wesley Gordon, Associate Director

Email: wgordon@ubalt.edu

The Issuing Office is the sole point of contact 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 solicitation. It is the sole responsibility of any Prospective Proposer to visit the University's website for all documents relating to this solicitation. Visit: [Current UBalt Solicitations](#)

UBalt Procurement Officer, Director of Procurement or their Designee.

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SOLICITATION SCHEDULE

Issued Date:	June 27, 2025
Last Day for Questions:	July 3, 2025, at 10:00 AM EST
Responses to Questions by:	July 10, 2025 (to vendors)
Technical Proposal Due Date:	July 31, 2025, at 10:00 AM ET
Oral Presentation: (Short listed firms ONLY)	August 7- 8, 2025
Financial Proposal Due Date: (Invited Firms ONLY)	August 15, 2025, at 10:00 AM ET
Contract Award Date (projected):	September 1, 2025
Contract Commencement Date (projected):	March 4, 2026

Note: Proposals are to be provided by the due date noted above. Proposals are to be submitted electronically to Issuing Office Contact(s) noted in this solicitation.

SECTION I.

GENERAL INFORMATION

1.1 OBJECTIVE

The University of Baltimore (UBalt) is soliciting proposals for qualified professional firms who specialize in providing course evaluation software services. The University seeks a Software-as-a-Service (SaaS) solution that can integrate with the University's existing academic architecture as described in the Solicitation.

UBalt currently uses Explorance for course evaluations and feedback management, enabling data-driven decision-making to enhance teaching effectiveness and student learning experience. UBalt originally adopted Explorance in 2013 and our existing contract expires in March 2026. The purpose of this solicitation is to provide qualified firms with an opportunity to propose their solution and services.

We invite qualified vendors to submit proposals detailing how their solutions can meet or exceed our current system's capabilities while ensuring a seamless transition if an alternative solution is selected. The University reserves the right to purchase items and services not specifically listed in this solicitation.

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.

Distance learning is an essential component for fulfilling the academic mission of the University of Baltimore. UBalt incorporates synchronous and asynchronous learning via Canvas. Faculty conduct instructional presentations and exams through Canvas with many online instructional tools, such as discussion forums, videos, web pages, etc. Students submit coursework and projects electronically. Students communicate with their faculty through Canvas messaging, email, online office hours, and other collaborative tools. Canvas integrates with other cutting-edge tools for teaching and learning including video applications, publisher platforms, exam proctoring, and student engagement systems.

The University of Baltimore's instruction delivery type for Spring 2025 was as follows:

Spring 2025: Percent Course Section by Course Career level and Instructional Delivery Type				
Course Career	In-person	Online	Hybrid	Total
Undergraduate	28%	58%	14%	100%
Graduate	27%	53%	19%	100%
APD	0%	97%	3%	100%
LAW	91%	3%	7%	100%
University Total	48%	39%	13%	100%

In the table below are the University of Baltimore's enrollments for the 2025 academic year. Enrollments were as follows: This data was taken from UBalt's Institutional Research group. However, the data is subject to change during the life of the contract.

Fall 2024: Enrollment Headcount & FTE		
Student Career	Headcount*	FTE
Undergraduate	1,477	934
Graduate	1,029	538
APD	20	7
Law	706	699
University Total	3,232	2,178

Spring 2025: Enrollment Headcount & FTE		
Student Career	Headcount*	FTE
Undergraduate	1,434	890
Graduate	949	488
APD	19	7
Law	670	661
University Total	3,072	2,046

UBalt students are highly successful, as demonstrated by UBalt's ranking in the top 5 percent of master's universities in the nation for earning performance 10 years after entering college, according to 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.

For more information about UBalt, visit www.ubalt.edu

1.3 ISSUING OFFICE

Stacey Brooks, Contract Specialist
University of Baltimore
Office of Procurement
1420 N. Charles Street
Baltimore, MD 21201
sbrooks@ubalt.edu

and

Wesley Gordon, Associate Director
University of Baltimore
Office of Procurement
1420 N. Charles Street
Baltimore, MD 21201
wgordon@ubalt.edu

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

1.4 MINIMUM QUALIFICATIONS.

At minimum, firms must demonstrate the following qualifications to be deemed eligible for award. Firms that do not include the required information that demonstrates the minimum qualifications shall not be considered for the award. The University reserves the right to waive this requirement.

- Three (3) years of providing Course Evaluation Software of experience operating and administering Course Evaluation Software in a university setting.
- An experienced vendor in the marketplace, having completed similar implementations and provided services for three or more regionally or nationally accredited higher education institutions. **References must accompany this Solicitation. References must clearly demonstrate this minimum qualification. Failure to clearly demonstrate having achieved this minimum qualification may result in your firm's proposal being deemed not susceptible to the award.**

1.5 QUESTIONS AND INQUIRIES

All questions and inquiries regarding this procurement must be directed to the individual(s) referenced above with the Issuing Office. 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. 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 solicitation. 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 solicitation. 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 solicitation or as updated via Addendum.

All Questions must be sent via a Word attachment to the following link: [RFP Questions](#).

1.6 REVISIONS OR AMENDMENTS TO THIS SOLICITATION

The University reserves the right to amend this solicitation at any time prior to the proposal due date. If it does become necessary to amend any part of this solicitation, the Procurement Officer will furnish an amendment or addendum to all prospective Proposers listed by the University as having received a copy of the solicitation. 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 VIRTUAL PRE-PROPOSAL CONFERENCE

A Pre-Proposal Conference will not be 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 July 31, 2025, at 10:00 AM EST. Proposals in digital format, as well as transactions and communication, in specified format, are permitted for this procurement. Proposals must be submitted via the link provided to the issuing office by the date and time noted in this solicitation 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 contractors will not be released until after the award. At the University's sole discretion, the Solicitation Schedule may be modified.

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 for 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 solicitation. Emphasis should be on completeness and clarity of content.

1.14 CONTRACT TERM

The initial contract term will be on or about March 4, 2026, through March 3, 2027. The University reserves the right to renew the contract for up to three (3) additional, separately exercisable, 12-month periods, with the same contract terms and conditions at the pricing finalized at contract award. The total contract for the life of the contract shall not exceed \$199,000, unless modified by an amendment or by Purchase Order, at a later date.

1.15 PAYMENT SCHEDULE

Payments will be made yearly on a net 30-day basis. The fee is to be inclusive of all travel costs. Payments are based on the total number of students (headcount based on census). The University of Baltimore will provide the vendor with current and updated course census twice per year (Fall and Spring). Payments must be adjusted accordingly.

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 confidential 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 solicitation. The solicitation 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 solicitation shall not be considered nor be made part of any Contract, if awarded.

1.19 MINORITY BUSINESS ENTERPRISES (MBE)

An MBE goal is not required under this Solicitation.

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](#).

1.20 TECHNICAL PROPOSAL/PRICE PROPOSAL SUBMISSION

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

1.21 ALTERNATE SOLUTION PROPOSALS

A proposer may submit an alternate solution to the approach depicted in the solicitation.

1.22 MULTIPLE PROPOSALS

A proposer may only submit one proposal.

1.23 INDEMNIFICATION OF THE UNIVERSITY

The successful Contractor must agree to indemnify, defend and hold the University of Baltimore, its employees and Regents harmless for any and all claims, damages, costs, fines and expenses that the University may incur as a result of, arising out of, or connected with decisions, actions, recommendations or referrals made by the Contractor's Therapeutic Counselors or any of Contractor's other employees. The Contractor must promptly inform the University of any claim, litigation, suit, or other action by a student, student's parent, or other third party.

END OF SECTION I

SECTION II.

SCOPE OF WORK/STATEMENT OF WORK

The University of Baltimore (UBalt) is committed to fostering teaching, learning and research excellence. As part of our strategic vision, we focus on:

- Enhancing the quality of education, research and instructional methods.
- Supporting our academic mission through efficient operations, best practices in customer service, strong fiscal management, and a highly skilled workforce.
- Developing a welcoming, sustainable, and modern urban campus.
- Building an inclusive and engaged community of students, faculty, staff and alumni.

The Contractor shall provide course evaluation software solutions and services (Software-as-a-Service (SaaS)), that can integrate with UBalt's existing academic architecture as described below. The Contractor shall use reasonable efforts to continuously improve its services, tools, and delivery methods throughout the term of this Agreement to support the customer's evolving needs and expectations.

2.2 SOFTWARE FEATURES AND CONTRACTOR'S SERVICES

The Contractor's SaaS shall include the mandatory requirements listed in Attachment D, Questionnaire and as described below. The Contractor's software and services will include but may not be limited to other features as described in Attachment D and listed below:

The Contractor shall have the following qualifications during the life of the Contract.

1. Mandatory Requirements:

a. Contractor's SaaS shall include/provide:

- SaaS Subscription Model: Must be based on an FTE or student headcount-based subscription.

NOTE: Pay-as-you-go or per-survey cost models are not acceptable.

- Single Sign-On (SSO) Integration: Must integrate with Shibboleth/SAML 2.0 for seamless access through the University's Canvas LMS.
- ADA Compliant: The system must comply with ADA Section 508 web accessibility standards.
- Hierarchical Structure: Must support a multi-level hierarchy (University > College > School > Department > Program > Course).
- User Roles & Permissions
- Reporting & Dashboards
- Survey Management
- Data Handling
- Security & Anonymity
- Mobile Compatibility

2. Technical Administration Features
 - Data Integration: Must support import from Peoplesoft SIS and handle cross-listed courses
3. Security Features
4. Documentation and Training: The contractor will provide user manuals, knowledge bases and training materials for various software users at the University. Training services shall outline an initial training format (web-based, on-site or hybrid) and duration. The University will contact the contractor to specify the training required for each user, length of session and on-site location.
5. Support and Maintenance
6. Hosting and Technical Environment
7. Unique Features and Future Enhancements

Implementation Timeframe

The contractor shall implement and configure the software and services as quickly as possible. Provide a structured Work Plan and schedule/timeline of how your firm will approach and complete the work. Work plans and schedule/timeline should include configurations, testing, integrations with Canvas LMS, PeopleSoft and security setup.

Work must commence within one month of contract signing, with full implementation completed within 60 days. **The software product needs to be configured and tested by January 8, 2026.**

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 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 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 solicitation. Each requirement must be addressed in the proposal and that response should be enumerated with the same section numbers listed in the Solicitation 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.

1.2.1 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.

Offerors/Proposers MUST meet the following minimum qualifications. Failure to meet the qualifications will result in Offeror being deemed not reasonably susceptible to being selected for award.

- A minimum of three (3) years of experience operating and administering Course Evaluation Software in a university setting.
- An experienced vendor in the marketplace, having completed similar implementations and provided services for three or more regionally or nationally accredited higher education institutions. **References must accompany this Solicitation. References must clearly demonstrate this minimum qualification. Failure to clearly demonstrate having achieved this minimum qualification may result in your firm's proposal being deemed not susceptible to the award.**

The Proposal should be divided and organized by clearly defined "Sections" referencing the sections/response requirements provided below:

1.2.2 Section 1: Transmittal Letter.

A transmittal letter on the Firm's business stationery referring to 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. 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 signing on behalf of the corporation.

1.2.3 Section 2: Table of Contents

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

1.2.4 Section 3: Company/Firm Profile (Attachment A)

Proposers shall have a minimum of three (3) years of experience operating and administering course evaluation software services in a university setting.

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 Course Evaluation Software services to clients in a university setting.

The Proposer shall include in their Section 3 submission:

1. Complete the **Company Profile Form (Attachment A)**

2. The proposer 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.

1.2.5 Section 4: Current Solution/Services and Past Services Experience (Attachment E)

Complete Attachment E, Contractor Experience and Reference Form, list and individually describe three (3) recent (within the last 5 years) course evaluation software services that best illustrate the firm's qualifications and are similar to UBalt's needs. Proposers should include course evaluation software services where the key individuals who were directly responsible for and directly assigned to the current course evaluation software services also will be assigned to UBalt's course evaluation software services. Proposers shall provide examples of similar size and scope to this solicitation 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 course evaluation 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 course evaluation software services or Key Personnel.

1.2.6 Section 5: 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 course evaluation software services. The proposer 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 proposer 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 course evaluation software services' duration if awarded 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.

1.2.7 Section 6: Standard and Required Services (Attachment D)

1.2.7.1 Section 6: Proposer shall complete the **Services Questionnaire, see Attachment D**. The Services 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.

1.2.8 Section. 7: Implementation Timeline

Work must commence within one month of contract signing, with full implementation completed within 60 days. **The software product needs to be configured and tested by January 8, 2026.**

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.
- Configuring and testing Shibboleth/SAML 2.0 SSO and any PeopleSoft Student Information System (SIS) feeds.
- Creating user-security levels in the system.
- Migration of data from the current system to the new system.
- Testing all aspects of the configured system, including integrations.
- Training of all technical personnel responsible for administering and maintaining the system.
- Support for go-live and initial implementation.
- Remote and post-production support with escalation process if serious problems occur.
- Documentation of any configuration and set-up for go-live.
- Availability of additional resources needed for functional or technical assistance.

1.2.9 Section 8: Other Requirements and Forms

- **Acknowledgement of Receipt of Addenda Form (see Appendix A).**

If any addenda to the Solicitation 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.

- **Bid Proposal Affidavit (see Appendix A).**

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

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

- **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.

- **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 shall complete the Acknowledgement of Review and Acceptance of the University of Baltimore Contract, see Appendix A for the form.

Proposers are to include a statement that the University's Contract terms and condition were reviewed and accepted, see 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. 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.

- **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>

END OF TECHNICAL RESPONSE REQUIREMENTS

SECTION III.

Article 2. FINANCIAL PROPOSAL RESPONSE REQUIREMENTS

ONLY INVITED FIRMS

2.0 FINANCIAL/PRICE PROPOSAL

2.1 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 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.

Proposers are to:

SUBMIT ONE PDF TITLED: "FIRM NAME_FINANCIAL PROPOSAL"

2.2 Financial/Price Proposals. See Attachment B for the Pricing Form

Proposers must complete and submit the Price Proposal Form included in Attachment B.

Contractor pricing should include modeling for subscription pricing based on FTE or student headcount, implementation and training costs, support and maintenance costs, optional module pricing and any additional fees. The University will provide the vendor with current and updated course census twice per year (Fall and Spring).

Proposers shall not include any pricing in the Technical Proposal.

Pricing shall be fixed for the first five (5) years.

Proposers shall include if and how yearly fees will be impacted if the FTE or student headcount, decreases or increases.

Thereafter, it will be the responsibility of the contractor to request a price increase, if any, within 120 days of the end of each contract year. Any price increase not received by that time may not be considered and pricing in the subsequent year will remain as stated during the just completed contract term. A price increase, if any shall not exceed the Consumer Price Index ("CPI") for "All Urban Consumers" as published by the US Department of Labor Statistics. For purposes of calculating the

potential increase, the CPI to be used will be for February of the current year. For example, for October 31, 2026, the price index for February 2026 will be used. Statistics will be referenced as a **cap** for negotiable purposes only, however, increases shall not exceed 5%. The Contractor is not to assume that any price increase will be applied to yearly renewals. Also, increases are not cumulative for prior years; if a contractor fails to request a price increase in one year and then requests an increase for the subsequent year, the contractor cannot include a cumulative amount which includes the prior annual term. Any increase approved by the University will take effect on the start of each contract year.

END OF SECTION III.

Article 2. FINANCIAL PROPOSAL RESPONSE REQUIREMENTS

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 solicitation. Failure to comply with any specification or requirement will normally 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 that are not reasonably susceptible to 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 solicitation 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 solicitation. 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 solicitation.

3.4 Technical Evaluation Criteria

The evaluation of proposals will be made from the criteria listed below. The criteria for the proposal evaluation are listed below in descending order of importance. Please see Section III, Article I for Submission of Information required in firm's proposals. Technical considerations are of greater importance than financial considerations.

1. Firm's ability to meet the University's requirements and needs, including but not limited to features, capabilities, functionality and timeline.
2. Relevant Past Experience with successful development in Higher Education. Note: Firms are required to meet the minimum qualifications to be deemed susceptible for award.
3. Company Profile and Experience.

4. The ability, extent and quality the firm can provide the required and additional services set forth in the Solicitation and Questionnaire.
5. Relevant Qualifications and Experience of Key Personnel and the Project Team.
6. Other Services.

3.5 Shortlisting

In accordance with the Evaluation Criteria, a shortlist 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.

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/Oral Presentations").

The purposes of the sessions are as follows:

- (i) To provide the Proposer with the opportunity to demonstrate/discuss their 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) If applicable, review the Price Proposal structure.

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

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 combine all ratings for each phase 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 Price Evaluation

Price Proposals will not be opened publicly. Price Proposals will be evaluated based on the full cost of the course evaluation software services.

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

Proposals cannot be modified, supplemented or changed in any way after the due date and time for proposals, unless specifically requested by the University. The University may elect to request Best & Final Price Proposal(s).

Discussions

The University reserves the right to recommend an Offeror for a contract award based upon the Offeror's technical proposal and price 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 Proposers.

4.2 Best and Final Offers

When in the best interest of the University and the State, the Committee may recommend and the Procurement Officer may permit qualified Offerors to revise their proposals by submitting "Best and Final" offers.

4.3 Final Ranking and Selection

Following evaluation of the technical proposals and the price 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 will have a greater weight than financial in the final ranking.

Award may be made to the proposal with a higher technical ranking even if its cost proposal is not the lowest. 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.

The University may select one or more Contractors to further engage in negotiations, including the 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.

4.4 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

ARTICLE 4 PRICE PROPOSALS AND FINAL EVALUATION PROCESS