



# Northland Pioneer College

EXPANDING MINDS • TRANSFORMING LIVES<sup>SM</sup>

## Request for Proposals

### Financial Aid Processing Solution

### AS #19-01

Northland Pioneer College desires to contract with qualified and experienced vendors to provide a Financial Aid Processing Solution (FAPS). The successful bidder must supply a product and/or service that matches the scope of work and specifications listed in this document. Any deviations from the scope of work, specifications, terms and conditions must be listed in the bid submission.

***DUE January 15, 2019 @ 3:00 P.M. MST***

**Proposals shall be submitted to, Northland Pioneer College, Chief Business Officer, P.O. Box 610, 2251 E. Navajo Blvd., Holbrook, Arizona 86025.**

Proposals must be submitted in a sealed envelope or box properly addressed to Northland Pioneer College, with AS #19-01, Proposal Due Date and Time, and Offeror's Name and Address clearly indicated on the envelope or box. Northland Pioneer College will not be responsible for late receipt of proposals. Proposals must be in the actual possession of Northland Pioneer College on or prior to the exact time and date indicated above. Proposals received by the correct time and date will be publicly read along with the name of each offeror.

This solicitation consists of instructions, general terms and conditions, special terms and conditions, scope of work and specifications, award criteria, and proposal form. Offerors are strongly encouraged to carefully read all general information, and scope of work and specifications. Failure to examine any of the requirements will be at offeror's risk.

**PROCEDURAL QUESTIONS regarding this Request for Proposal should be directed to:**

**Maderia Ellison, Chief Business Officer Phone (928) 524-7440.**

**Email [maderia.ellison@npc.edu](mailto:maderia.ellison@npc.edu)**

**TECHNICAL QUESTIONS regarding this Request for Proposal should be directed to:**

**Jason LaBute, Coordinator of Administrative Systems and Projects. Technical questions should be submitted by e-mail to [jason.labute@npc.edu](mailto:jason.labute@npc.edu). All questions and answers will be distributed to all RFP recipients.**

**FINANCIAL AID PROCESS QUESTIONS regarding this Request for Proposal should be directed to:**

**Jeremy Raisor, Director of Enrollment Services. Process questions should be submitted by e-mail to [Jeremy.Raisor@npc.edu](mailto:Jeremy.Raisor@npc.edu). All questions and answers will be distributed to all RFP recipients.**

# Offer and Contract Award

## Financial Aid Processing Solution

### ***To Northland Pioneer College:***

The undersigned hereby certifies understanding, compliance and acceptance of the General Terms and Conditions in addition to the Special Terms and Conditions as required by this solicitation. Offeror further agrees to furnish materials and/or services in compliance with all terms, conditions, specifications and amendments in the solicitation and any written exceptions in the offer.

Federal Employer Identification Number \_\_\_\_\_

Company Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Toll Free Number \_\_\_\_\_ Fax \_\_\_\_\_

Printed Name \_\_\_\_\_ Title \_\_\_\_\_

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

Authorized Signer: Phone \_\_\_\_\_ Email \_\_\_\_\_

---

*(This portion to be completed by Northland Pioneer College Only)*

## Acceptance of Offer and Contract Award

### **YOUR PROPOSAL IS HEREBY ACCEPTED:**

As Contractor, you are now bound to sell the materials and/or services offered to and accepted by Northland Pioneer College in accordance with the solicitation, including all terms, conditions, specifications, amendments, etc.

Awarded this \_\_\_\_\_ day of \_\_\_\_\_ 2019.

The Contractor will not commence any billable work or provide any material or service under this Contract unless and until Contractor receives a purchase order from Northland Pioneer College.

---

Maderia Ellison  
Chief Business Officer

## *General Terms and Conditions*

### **CERTIFICATION**

*By signing the Offer and Contract Award page, Offeror certifies the following:*

1. Offeror has examined and understands the terms, conditions, specifications, scope of work and other documents in this solicitation.
2. The submission of the offer did not involve collusion or other anti-competitive practices. Neither signatory nor any person on his behalf, has not agreed, connived or colluded to produce a deceptive show of competition in the matter of the bidding or award of a contract under this solicitation.
3. Offeror has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer.
4. Neither Offeror, nor any officer, director, partner, member or associate of Offeror, nor any of its employees directly involved in obtaining contracts with the Northland Pioneer College has been convicted of false pretenses, attempted false pretenses, or conspiracy to commit false pretenses, bribery, attempted bribery or conspiracy to bribe under the laws of any state or federal government for acts or omissions after January 1, 1985.
5. Offeror agrees to comply fully with any and all provisions of A.R.S. § 32-1101 et seq. (Registrar of Contractors) that may regulate Offeror's business. Offeror will not discriminate against any employee, or applicant for employment in violation of federal and state laws (see Federal Executive Order 11246; A.R.S. § 41-1461 et seq.).
6. Offeror is not currently suspended, debarred or otherwise precluded from participating in any public procurement activity with any federal, state or local government entity.
7. If awarded a contract, Offeror will provide the equipment, commodities, and/or services to Northland Pioneer College in accordance with the terms, conditions, scope of work, specifications, and other documents of this Request for Proposal.
8. If awarded a contract, Offeror agrees that all students, staff and other individuals eligible to receive services will have equal access to the services regardless of race, religion, color, sex, disability, age or national origin (including language minority individuals).

### **CONFIDENTIAL INFORMATION**

**Confidential information request:** If Offeror believes that its proposal contains trade secrets or proprietary information that should be withheld from public inspection, a statement advising Northland Pioneer College of this fact will accompany the proposal, and the information will be so identified wherever it appears. Northland Pioneer College will review the statement and will determine in writing whether the information will be withheld. If Northland Pioneer College determines to disclose the information, Northland Pioneer College will inform Offeror in writing of such determination.

**Pricing:** Northland Pioneer College will not consider pricing to be confidential or proprietary.

**Public record:** All proposals submitted in response to this solicitation will become the property of Northland Pioneer College and will become a matter of public record available for review, subsequent to award notification, under the supervision of Northland Pioneer College, by appointment, at 2251 E. Navajo Boulevard, Holbrook, Arizona.

## **DELIVERY**

**Default in one installment to constitute total breach:** Offeror will deliver conforming materials and may not substitute nonconforming materials. Northland Pioneer College reserves the right to declare a breach of contract if Offeror delivers nonconforming materials.

**Defective goods:** Offeror agrees to pay for return shipment of goods that arrive in a defective or non-operable condition. Offeror will arrange for return shipment of damaged or defective goods.

**Delivery time:** Delivery is desired within thirty (30) days of receipt of purchase order. Exceptions should be listed by offeror. Delivery time is of the essence and failure to deliver any order within the time frame specified may result in cancellation.

**Improper delivery:** Unless contrary to other parts of this solicitation, if the goods or tender of delivery fail in any respect to conform to this contract, Northland Pioneer College may reject the whole, accept the whole, or accept any commercial unit or units and reject the rest.

## **EVALUATION & AWARD**

**Basis of award:** In accordance with A.R.S. § 41-2534(G), award(s) will be made to the responsive and responsible Offeror(s) whose proposal(s) is (are) determined in writing to be most advantageous to Northland Pioneer College.

**Criteria:** The evaluation criteria for this solicitation, in relative order of importance, are as follows: 1) conformance to the terms and conditions in the solicitation; 2) completeness of the proposal and required forms; 3) service capabilities; 4) price; 5) references and Past Performance Information (PPI) review.

**Deviations and exceptions to requirements:** Deviations or exceptions stipulated in a proposal may result in disqualification. Language to the effect that Offeror does not consider this solicitation part of the contract may result in rejection of the proposal.

**Formation of contract:** A response to this solicitation is an offer to contract with Northland Pioneer College based upon the terms, conditions, scope of work, and specifications contained in this request. A proposal does not become a contract unless and until Northland Pioneer College accepts it. A contract is formed when a Northland Pioneer College official signs the award document.

**Past performance information:** Past Performance Information (PPI) is relevant information regarding an Offeror's actions under previously awarded contracts to schools and local, state or federal agencies. It includes Offeror's record of performance under such contracts including, but not limited to conformance to the terms, conditions, specifications and scope of work of the contracts, responsiveness to, and correction of, contract claims and controversies, and satisfaction of the contracting entities. PPI will be a factor in evaluation and award.

**Reference to contract:** The contract or purchase order number **MUST** appear on all invoices, packing lists, packages and correspondence pertaining to the contract.

**Responsible Offeror:** A responsible Offeror is a firm or person with the capability to perform the contract requirements and the integrity and reliability that will assure good faith performance. Northland Pioneer College must determine an Offeror to be responsible before awarding a contract to Offeror.

**Responsive proposals:** A responsive proposal reasonably and substantially conforms to all material requirements of the solicitation. Proposals must be responsive to receive consideration.

**Total costs:** Total district costs include energy, facilities, repair costs, present values of moneys, Offeror charges, personnel costs and all other identifiable district costs. Offeror charges include all the costs of Offeror support, materials, transportation and all other identifiable costs associated with the proposal. Offeror costs means the costs of all hardware, materials, software, transportation, Offeror support and all other identifiable costs associated with the proposal. Offeror support means services provided by the Offeror, such as consulting, education, training, management of the system purchased and other integration and maintenance support.

**Weighted evaluation:** Northland Pioneer College reserves the right to use a point system to evaluate proposals and to assign points to the evaluation criteria as it determines most appropriate. Any Offeror scoring 0 (zero) in any required area may be considered nonresponsive.

**FORCE MAJEURE**

Except for payments of sums due, neither party will be liable to the other, nor be deemed in default under this contract, if and to the extent that such party’s performance of this contract is prevented by reason of force majeure. The term “force majeure” means an occurrence that is beyond the control of the party affected and occurs without its fault or negligence, including, but not limited to the following: acts of God; acts of the public enemy; war; riots; strikes; mobilization; labor disputes; civil disorders; fire; flood; snow, earthquakes; tornadoes or violent winds; hail storms; lockouts; injunctions-intervention-acts, or failures or refusals to act by government authority; and other similar occurrences beyond the control of the party declaring force majeure, which such party is unable to prevent by exercising reasonable diligence. The force majeure will be deemed to commence when the party declaring it notifies the other party of the existence of the force majeure, and will be deemed to continue as long as the results or effects of the force majeure prevent the party from resuming performance in accordance with the contract. Force majeure will not include late deliveries of equipment or materials caused by congestion at a manufacturer’s plant or elsewhere, an oversold condition of the market, inefficiencies, or similar occurrences. If either party is delayed at any time by force majeure, the delayed party will notify the other party in writing of such delay within forty-eight (48) hours.

**IMMIGRATION LAW COMPLIANCE**

In accordance with the provisions of A.R.S. § 41-4401, Offeror hereby warrants that it and all of its subcontractors (if any) will comply with, and are contractually obligated to comply with, all Federal Immigration laws and regulation that relate to their employees and A.R.S. § 23-214(A) (hereinafter “Contractor Immigration Warranty”). A Breach of the Contractor Immigration Warranty shall constitute a material breach of this Agreement and shall subject the breaching party to penalties up to and including termination of this Agreement at the sole discretion of the non-breaching party. Northland Pioneer College retains the legal right to inspect the papers of Offeror or any of its subcontractor employees to ensure that the Offeror or subcontractor is complying with the Contractor Immigration Warranty. Northland Pioneer College may, at its sole discretion, conduct random verification of the employment records of the Offeror and any of its subcontractors to ensure compliance with Contractor Immigration Warranty. Offeror will not be considered in material breach of this Agreement or the Contractor Immigration Warranty if the party establishes that it has complied with the employment verification provision prescribed by sections 274A and 274B of the Federal Immigration and Nationality Act and the E-Verify requirements prescribed by A.R.S. § 23-214(A). The provisions of this Section must be included in any contract that a party enters into with any and all its contractors or subcontractors who provide service under this Agreement or any subcontract.

**INDEMNIFICATION**

**General indemnification:** To the extent permitted by A.R.S. § 41-621 and § 35-154, Northland Pioneer College will be indemnified and held harmless by Offeror for its vicarious liability as a result of entering into this Contract. Each party to the contract is responsible for its own negligence.

**Modification:** Offeror will have no obligation with respect to any patent and copyright infringement claim based upon Northland Pioneer College’s modification of the equipment and/or software, or its operation or use with apparatus, data or programs not furnished by Offeror.

**Patent and copyright indemnification:** To the extent permitted by A.R.S. § 41-621 and § 35-154, Offeror will indemnify and hold harmless Northland Pioneer College against any liability, including costs and expenses, for infringement of any patent, trademark or copyright arising out of contract performance or use by Northland Pioneer College of materials furnished or work performed under this contract. Northland Pioneer College will reasonably notify Offeror of any claim for which it may be liable under this paragraph.

## **INQUIRIES**

Any procedural question related to this solicitation will be directed to the Chief Business Officer. Inquiries may be faxed, (928) 524-7411, or e-mailed to Maderia Ellison, [maderia.ellison@npc.edu](mailto:maderia.ellison@npc.edu). Any technical information request related to this solicitation will be directed to Jason LaBute. Inquires may be e-mailed to Mr. LaBute, [jason.labute@npc.edu](mailto:jason.labute@npc.edu). Northland Pioneer College may require any and all questions to be submitted in writing.

## **LICENSES**

Offeror will maintain in current status all federal, state and local licenses, bonds and permits required for the operation of the business conducted by Offeror. Offeror will remain fully informed of and in compliance with all ordinances and regulations pertaining to the lawful provision of services under the contract. Northland Pioneer College reserves the right to stop work and/or cancel the contract of any Offeror whose license(s) expire, lapse, are suspended or terminated.

## **Conflict of Interest**

Northland Pioneer College reserves all rights that it may have to cancel any Agreement for possible conflicts of interest under A.R.S. § 38-511.

## **NO ISRAEL BOYCOTT**

Offeror agrees it is not currently engaged in, and agrees that for the duration of the Agreement it will not engage in, a boycott of Israel, as that term is defined in A.R.S. § 35-393.

## **OFFER ACCEPTANCE PERIOD/WITHDRAWAL**

**Late offers:** Late offers will not be considered.

**Offer acceptance period:** A proposal submitted in response to this solicitation will be valid and irrevocable for thirty days (30) after submittal due date and time.

**Withdrawal of proposal:** At any time prior to the specified due date and time, Offeror may withdraw proposal.

## **OVERVIEW**

**Applicable law:** Contract will be governed by the laws of the State of Arizona. Suits pertaining to the contract may be brought only in courts in the State of Arizona. Contract is subject to arbitration only to the extent required by the Arizona Procurement Code.

**Application of law:** The Arizona Procurement Code and the Uniform Commercial Code (UCC) as adopted by the State of Arizona are part of this document as if fully set forth herein. Any provision or clause required by law, rule or regulation to be included in the contract will be read and enforced as if in the contract, whether or not physically included. If any provision is not included, or is not correctly included, contract will be amended in writing to make such inclusion or correction on application from either party to contract.

**Captions, headings and illustrations:** The captions, illustrations, headings, and subheadings in this solicitation are for convenience and ease of perusal only, and in no way define, limit or describe the scope or intent of the request.

**Contract claims or controversies:** The requirements of the Arizona State Procurement Code will govern any contract awarded as a result of this solicitation, as well as any contract claims or controversies associated with it.

**Definition of time:** Periods of time, stated as a number of days, will be in calendar days, not business days.

**Liens/serial numbers:** All materials and services will be free of liens. Offers must be for equipment on which the original manufacturer's serial number has not been altered in any way.

**Novation:** If Offeror sells or transfers all assets or the entire portion of the assets used to perform this

contract, a successor in interest must guarantee to perform all obligations under this contract. Northland Pioneer College reserves the right to accept or reject the newly-formed companies solely based on information provided in the proposal and/or its own investigation of the company.

**Offeror qualifications:** Offeror will have extensive knowledge and at least five (5) years' experience with the provision of the services offered. Northland Pioneer College reserves the right to accept or reject newly-formed companies solely based on information provided in the proposal and/or its own investigation of the company.

**Order of precedence:** In the event of a conflict in the provisions of the contract as accepted by Northland Pioneer College, the following order of precedence will prevail:

1. Special term and conditions
2. General term and conditions
3. Scope of Work and Specifications
4. Attachments and exhibits
5. Documents referenced or included in the solicitation

**Pricing extension errors:** In case of error in extension of prices in the offer, unit prices will govern.

**Proposal opening:** Proposals will be opened as soon as practicable following the proposal due date and time.

**Proposal prices:** Proposals are requested for the total package.

**Proposal reading:** The name of each Offeror and total cost on the Proposal Submission form will be publicly read and recorded in the presence of witnesses. All information in the proposals will remain confidential until after award of contracts, with the exception of review by Northland Pioneer College staff.

**Quantities:** Quantities provided on the Proposal Submission form are estimates and may be revised by Northland Pioneer College at the time of contract award.

**Relationship of the parties:** Offerors receiving contracts under this solicitation are independent contractors. Neither party to the contract will be deemed to be the employee of another party to the contract.

**Severability:** The provisions of this contract are severable to the extent that any provision or application held to be invalid will not affect any other provision or application of the contract, which may remain in effect without the invalid provision, or application.

**Successful performance:** The sections of solicitation defining the scope of services, requirements, qualifications, etc., are not to be construed as a complete listing that exempts successful Offeror from reasonable services required to ensure successful performance under the contract.

## **PAYMENT**

**Billing:** All invoices will list the applicable purchase order number(s). Late fees are not permitted. All transactions are payable in U.S. currency only.

**Correct billing:** Northland Pioneer College will not process an invoice that doesn't match the purchase order. When discovered, incorrect purchase orders or invoices resulting in excess charges must be corrected by Offeror, no matter the cause of the error. Any excess payment must be returned to Northland Pioneer College within thirty (30) days.

**Invoice & payment:** As full consideration for the satisfactory performance by the Offeror, Northland Pioneer College will pay the Offeror in accordance with the prices stipulated in the Proposal Submission form. Invoices will as a minimum, include the contract/purchase order number and total dollar amount.

**The Offeror will submit the original invoice for payment to the following address:**

Northland Pioneer College  
Business Office

P.O. Box 610  
Holbrook, AZ 86025

**Payment time:** Northland Pioneer College's payment terms are Net 30 days from receipt of Offeror's invoice.

### **PREPARATION OF PROPOSAL & PROPOSAL FORMAT**

**Amendment of proposal:** A proposal may be amended up to the time of submittal.

**Compliance with instructions:** Offeror's ability to follow proposal preparation instructions in this solicitation will be considered an indicator of Offeror's abilities. As a result, the proposal will be evaluated as a sample of data submission. Subjective judgment on the part of Northland Pioneer College is implicit in this process.

**Cost of proposal preparation:** Northland Pioneer College will not reimburse the cost of developing, presenting, or providing any response to this solicitation.

**Offeror responsibility:** Offeror will examine the entire solicitation, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting proposal. Failure to examine any requirements will be at Offeror's risk. Negligence in preparing an offer confers no right of withdrawal after due date and time.

**Proposal forms:** The forms and format contained in the solicitation will be used. Offerors may reproduce the forms and retype the information, but all of the required information must be presented.

**Receipt of proposals:** Proposals must be in the actual possession of Northland Pioneer College at or prior to the exact time and date set for proposal submission.

**Signature(s) on proposals:** The offer and contract award document must be submitted with a signature by the person authorized to sign the offer. The person signing offer will initial erasures, interlineations or other modifications in proposal. Failure to sign the offer and contract award document, or to make other notations as indicated, may result in rejection of proposal.

**Wording in response:** Offeror will indicate "comply" or "deviate" for each specification where requested in proposal document. Details for any and all deviations will be provided, as requested. Deviations may be accepted or rejected by Northland Pioneer College, and Northland Pioneer College's decision will be final.

### **SAFETY STANDARDS**

Items supplied under the contract will comply with applicable Occupational Safety & Health Standards of the Arizona Industrial Commission, National Electric Code, and National Fire Protection Association Standards.

### **SHIPPING**

**Shipping terms/transfer of title:** Shipments will be F.O.B. destination. Title and risk of loss of material will not pass to Northland Pioneer College until the material is received at delivery point, unless otherwise provided in the contract. Title to an undivided share or quantity of an identified mass of fungible goods will not pass to Northland Pioneer College until a separation of purchased share has been made, delivered and received.

**Shipment under reservation:** Offeror is not authorized to ship materials under reservation and no tender of a bill of lading will operate as a tender of the materials.

**Shipping charges:** Prices that include shipping, delivered to the specific receiving point identified in the Northland Pioneer College purchase order, are preferred. If shipping is charged, it will be prepaid and the actual cost added to the invoice. Shipping charges as a percentage of purchase price may be offered, if Offeror agrees that Northland Pioneer College will not be charged more than the actual invoiced amount for shipping. If Offeror requires Northland Pioneer College to pay for shipping, weight of the empty container and any material used for packing will be of the lightest weight practical for safe delivery of the contents.



**Shipping errors/risk of transportation:** Shipping errors will be at Offeror's expense. If Offeror ships a product that was not ordered, Offeror will pay for return shipment at the convenience of Northland Pioneer College. All risk of transportation and all related charges will be Offeror's responsibility. Offeror will file all claims for visible or concealed damage. Northland Pioneer College will notify Offeror promptly of any damaged goods and will assist Offeror in arranging for inspection.

## **SPECIFICATIONS**

**Use of brand names:** Brand names, trade names, model numbers, and/or catalog numbers may be used to indicate the character, quality, and/or performance characteristics of the materials desired. Use of the name of a manufacturer, brand, make or catalog number does not restrict Offeror from offering suitable alternates. However, Northland Pioneer College reserves the right to decide whether alternatives to the identified manufacturer and brand are equal to the materials, equipment described in the solicitation. Northland Pioneer College will be the sole judge on the question of equal quality, and Northland Pioneer College's decision will be final.

**Compliance with specifications:** The fact that a manufacturer, supplier or Offeror chooses not to produce or supply equipment, supplies or services to meet the specifications will not be considered sufficient cause to adjudge the specifications as restrictive. Offerors will offer equipment, supplies, and/or services they believe come closest to meeting specifications.

**Deviations from specifications:** Offeror will provide an explanation for each deviation to the specifications. Failure to detail deviations may result in rejection of the proposal.

**Purpose of specifications:** Specifications are designed to enable Offeror to satisfy a requirement for a product, material, process, or service. A specification may be expressed as a standard, part of a standard, or independent of a standard. No specification is intended to limit competition by eliminating items capable of satisfactorily meeting the requirements of the procurement. If Offeror believes a specification is unnecessarily restrictive, Offeror must indicate such in its proposal.

## **SUSPENSION OR DEBARMENT STATUS**

Offeror will include a letter (**page 19**) in its proposal notifying Northland Pioneer College of any debarment, suspension or other lawful action taken by any federal, state or local government within the last five (5) years that precludes Offeror or its employees from participating in any public procurement activity. Such letter will provide name and address of the public procurement unit, effective date, duration, and relevant circumstances of the suspension or debarment. Failure to supply such letter or not disclose all pertinent information will result in cancellation of any contract.

## **TAXES**

**Federal excise tax:** Northland Pioneer College is **exempt** from paying Federal Excise Tax.

**State Transaction Privilege tax:** Northland Pioneer College **does** pay Arizona TPT, sales, or use tax.

**Payment of taxes:** Northland Pioneer College will send payment for all taxes listed on the invoice. However, Offeror will forward all taxes to the proper revenue office. Installation of equipment which becomes permanently attached to a structure is taxable as a contracting activity.

**Prices:** Prices will include all applicable state and local taxes. All applicable taxes must be listed as a separate item on all invoices.

**Property taxes:** Northland Pioneer College does not pay Arizona state property taxes (Arizona Constitution, Article 9, Section 2). Offerors who lease equipment that is subject to property taxes may not invoice Northland Pioneer College for property taxes. Offerors who sell contracts to third parties will inform the owner of a lease contract that no Arizona state property taxes are allowed.

**Taxes on shipping:** Sales tax may not be collected on delivery charges to Northland Pioneer College, if separately stated on the invoice.

## **WARRANTY**

**Warranty requirements:** Offeror warrants that all equipment, materials, and service delivered under this contract will conform to the specifications. All equipment will carry a minimum 60-month manufacturer's warranty that includes parts and labor. Offeror agrees to help Northland Pioneer College reach resolution in a dispute with the manufacturer over warranty terms. Any extended manufacturer's warranty will be passed on to Northland Pioneer College without exception.

#### **WARRANTY/QUALITY GUARANTEE**

**Fitness:** Offeror warrants that any equipment or material supplied to Northland Pioneer College will fully conform to all requirements of the contract and all representations of Offeror, and will be fit for all purposes and uses required by the contract.

**Inspection:** The warranties set forth in this section will not be affected by inspection or testing of, or payment for the equipment.

**Quality:** Unless otherwise modified elsewhere in this solicitation, Offeror warrants that for one year after acceptance of the equipment or materials by Northland Pioneer College, they will be:

1. Of a quality to pass without objection in the industry or trade normally associated with them;
2. Fit for the intended purpose(s) for which they are used;
3. Of even kind, quantity and quality within each unit and among all units, within the variations permitted by the contract;
4. Adequately contained, packaged and marked as the contract may require; and
5. Conform to the written promises or affirmations of fact made by Offeror.

**General Terms & Conditions Acceptance Form**

---

*Signature on page two certifies complete acceptance of the General Terms and Conditions in this solicitation, except as noted below (additional pages may be attached, if necessary).*

*We take the following exceptions to the Terms and Conditions (Check the "None," box if no exceptions are taken):*

None

---

---

---

---

---

---

---

---

---

---

## *Special Terms & Conditions*

*The following special terms and conditions are in addition to the general terms and conditions.*

**Purpose:** Northland Pioneer College is seeking proposals for software and/or services to support a Financial Aid Processing Solution (FAPS). The FAPS will support Northland Pioneer College's enrollment management strategic priority. The Offeror may offer products and services in any combination to support critical details of the strategic priority as outlined in the Scope of Work & Specifications, Appendix A, and Appendix B.

The goal of this project is to support enrollment management by improving financial aid processes in order to increase both student recruitment and student retention. Specifically, project outcomes are aimed at reducing the amount of time students are waiting for their financial aid awards to be approved.

Northland Pioneer College currently utilizes the Jenzabar CX Enterprise Resource Planning (ERP) and Student Information System (SIS). OnBase and CampusLogic are also used to collect and store required financial aid documents. CampsLogic handles documents directly related to student verification while OnBase is used for all other documentation outside of the verification process.

**Scope of Work:** The Offeror will submit a proposal to provide software and/or services to support this strategic priority by providing a mechanism to improve financial aid awarding efficiency as outlined in the Scope of Work & Specifications and Appendix A. The proposal will include all software and services required to effectively install, configure, and maintain a FAPS in addition to training administrative and end users on system usage. The FAPS software and services must provide all current features and capabilities as detailed in the Scope of Work and Specifications. The Offeror shall include a proposed implementation schedule with their response.

The Offeror may propose software and services from more than one product and service provider, but the Offeror will provide a single point of contact for all support and payment.

The Offeror will assume responsibility for installing, configuring, and maintaining the FAPS no later than one hundred and twenty (120) days from proposal acceptance. The last thirty (30) days of this period will be dedicated to internal testing by Northland Pioneer College staff. If the 120-day requirement is unreasonable, the Offeror may suggest a reasonable alternative schedule in the proposal.

**Experience and References:** Offeror must have installed, configured, and maintained the proposed FAPS for at least three (3) Jenzabar clients previously. These services must have been extensive and references for these prior engagements must be provided with the Offeror's response.

**Fixed rate billing for subscription based contracts:** Fixed rate billing must be used for all proposed subscription based contracts. The Offeror will be required to accept payments for services rendered on either an annual or semi-annual basis.

**Sample Contract:** The Offeror must provide a sample contract or contract template along with the proposal that accurately reflects any contracts Northland Pioneer College would be asked to sign upon acceptance of offer.

**Selection process:** Up to three (3) Offerors will be selected for a *required* presentation of proposal details and qualifications. The presentation may be presented in person at the Painted Desert Campus in Holbrook, Arizona or online and should be at least sixty (60) minutes in length. The presenting Offerors will be selected based on the Criteria identified under the Evaluation and Award section of the General

Terms & Conditions of this Request for Proposals (see pages 4 and 5 of this RFP) and the proposed implementation schedule. A standardized scoring instrument, developed by Northland Pioneer College, will be used to evaluate all proposals. Appendix A is the scoring instrument. Appendix B is a tentative evaluation, award, and implementation schedule.

**Submission materials:** The Offeror will submit a proposal describing how the Offeror will provide software and services for a FAPS. Submission materials will be submitted as one printed copy and one electronic copy.

**Technical Support:** The Offeror must provide technical support between the hours of 7:00 AM and 6:00 PM Monday through Friday (Arizona time) with a response by telephone or email within thirty (30) minutes and successful resolution within eight (8) business hours.

## *Special Terms & Conditions Acceptance Form*

---

*Signature on page two certifies complete acceptance of the Special Terms and Conditions in this solicitation, except as noted below (additional pages may be attached, if necessary).*

*We take the following exceptions to the Special Terms and Conditions  
(Indicate "None," if no exceptions are taken):*

None

---

---

---

---

---

---

---

---

---

---

## Scope of Work & Specifications

Offerors will respond to each numbered item by checking the appropriate “Comply” or “Deviate” box. “No Bid” items will be marked as such in the appropriate “Deviate” box. Details for deviations will be listed by items numbered on the Scope of Work & Specifications Acceptance Form.

Requirement	Comply	Deviate
<b>General Requirements</b>		
1. Allows users of varying roles to determine student financial aid eligibility, process Title IV and scholarship financial aid awards, and prepare for disbursement based on <i>Institutional Student Information Record (ISIR)</i> data, Satisfactory Academic Progress (SAP), and other key financial aid indicators.		
2. User permissions are based on Access Control Lists (view, add, edit, delete).		
3. Separate and configurable user interfaces based on user roles and permissions. (i.e. Financial Aid Call Center Staff, Financial Aid Specialists, Administrators, IT Staff).		
4. Automated student import from <i>Enterprise resource planning (ERP)</i> system and U.S. Department of Education (DOE) systems. Pulls ISIR information, SAP data, biographical profile, registration data, and demographic information to be used for determining financial aid awards.		
5. Capable of accessing metadata from ERP system.		
6. Integrates with Jenzabar CX, OnBase, and CampusLogic. Integration includes importing ISIR, SAP, and other key eligibility indicators.		
7. Exports data to Jenzabar CX and DOE systems regarding financial aid corrections, disbursements, SAP status, and other key financial aid award details.		
8. Ability to auto-package students not selected for verification, lacking actionable “C” codes, and automatically adjusting to current enrollment.		
9. Provides automated email and text message status updates to students. Allows for manual emails and text messages to be sent from the system.		
10. Configurable email and text message templates.		
11. Allows a student to be assigned to a specific financial aid specialist for processing.		
12. Ability to identify conflicting information provided by students within software solution. Provides best practice guidance to users for resolving common conflicts.		
13. Ability to prepare Cost of Attendance (COA) budgets for students and track their unmet need.		
14. Ability to assign notes to student accounts.		

15. User interfaces are web based and compatible with Microsoft Windows, and Apple OSX. Provides an equal user experience in the latest versions of Microsoft Internet Explorer, Mozilla Firefox, Google Chrome, Apple Safari without the use of third party plugins.			
16. Extensive internal reporting tool provided (proprietary or 3 <sup>rd</sup> party) with the ability to export reports as Excel and PDF or Word files. Reports include those for user productivity, award reconciliation, and student award status.			
17. Provides for secure communication and data transfer between the client and server.			

**Deviations must be listed on the Scope of Work & Specifications Acceptance Form. List the requirement and associated specification number for each deviation.**



## *Scope of Work & Specifications Acceptance Form*

---

*Signature on page two certifies complete acceptance of the Scope of Work and Specifications in this solicitation, except as noted below (additional pages may be attached, if necessary).*

*We take the following exceptions to the Scope of Work and Specifications  
(Indicate "None," if no exceptions are taken):*

None

---

---

---

---

---

---

---

---

---

---

---

**NORTHLAND PIONEER COLLEGE  
PROPOSAL SUBMISSION FORM  
RFP AS #19-01  
Financial Aid Processing Solution**

**The Offeror will furnish all materials and services as required in accordance with the Scope of Work & Specifications, Special Terms & Conditions, and General Terms & Conditions of the proposed contract for the amount(s) listed herein.**

Pricing will include a one-time cost (if applicable) and recurring annual cost for the maintenance and support of the proposed Financial Aid Processing Solution (FAPS).

<b>Required Products/Services</b>	<b>One-time cost</b>	<b>Recurring cost/Annual (if applicable)</b>
Financial Aid Processing Solution (FAPS) as outlined in the Scope of Work and Specifications and Appendix A.	\$	\$
Professional Services for installation, configuration, and training.	\$	\$
Maintenance (updates and technical support)	\$	\$
OTHER	\$	\$

Signature \_\_\_\_\_

Date \_\_\_\_\_

Email \_\_\_\_\_

**NORTHLAND PIONEER COLLEGE CERTIFICATION**  
**Regarding Debarment and Suspension**

Applicant acknowledges that, to the best of his/her knowledge, their company and principal participants on this contract/purchase:

1. Are not debarred, suspended, or otherwise slated for debarment, ineligible and/or excluded from participation on Federal and State Government contracts/purchases, etc.
2. Are not presently nor have been criminally indicted or civilly charged by a governmental entity (Federal or State) for fraud, forgery, falsification, theft, bribery, destruction of records, receiving stolen property and other criminal offenses in the administration of a government contract.
3. Have not been terminated for cause or convenience by a governmental entity in the administration of a government contract (Federal or State).
4. If Northland Pioneer College determines that the Certificate provided herein is not true, it will be grounds to terminate the contract/purchase and pursue other legal remedies.

Offeror Name & Address:

Name & Signature of Applicant

---

---

---

\_\_\_\_\_  
*Type or Print Name*

\_\_\_\_\_  
*Signature* *Date*

## ***Offeror's Checklist for Submission of Proposal***

***Check or initial the lines below to indicate that you have included the information.***

- \_\_\_\_\_ The *Offer and Contract Award* page is signed. (Page 2)
  
- \_\_\_\_\_ A completed *General Terms and Conditions Acceptance Form* is provided. Any exceptions to the General Terms and Conditions are noted and explained. (Page 11)
  
- \_\_\_\_\_ A completed *Special Terms and Conditions Acceptance Form* is provided. Any exceptions to the Special Terms and Conditions are noted and explained. (Page 14)
  
- \_\_\_\_\_ A completed copy of the *Scope of Work and Specifications Form* is provided. Any exceptions to the Specifications and/or explanations for deviations to the specifications are provided. (Pages 15 & 16)
  
- \_\_\_\_\_ A copy of the *Scope of Work and Specifications Acceptance Form* with any deviations noted is provided OR indicated as “none” if no exceptions or deviations are taken. (Page 17)
  
- \_\_\_\_\_ The *Proposal Submission Form* is provided and signed. (Page 18)
  
- \_\_\_\_\_ A completed copy of the *Northland Pioneer College Certification Regarding Debarment and Suspension* is provided. (Page 19)

Thank you for your consideration of this RFP.

## Appendix A

NPC Financial Aid Processing Solution Scoring Instrument						
Evaluation Criterion	Good (Score = 2)	Acceptable (Score = 1)	Unacceptable (Score = 0)	Score (2,1,0)	Weight	Weighted Score
1. Appropriate solution for the appropriate problem	Solution is designed for comprehensive financial aid processing. Meets strategic priority outcomes to automate awarding and reduce processing times.	Solution meets many of the strategic priority outcomes, but not all of them. Features or functionality of the software fall short of expectations.	Solution is not the appropriate solution to obtain the goals of the strategic priority.	0	100	0
2. Ease of use (end user)	Interfaces are simple and intuitive. System responds to user input and queries in a timely fashion. System understands and accommodates the needs of its users.	Solution is slow.	Unnecessarily complex processes. Cumbersome or unintuitive user interface (e.g., multiple clicks to achieve a task). Not user friendly.	0	100	0
3. Security, privacy, local, state, and federal laws	Role-based access control at a detailed level. Secure web site and secure communication (https), and encryption of relevant data.	Some role-based access control. Unclear security features and/or encryption of relevant data.	Lack of role-based access to data. Insecure web site (http). Lack of proper encryption.	0	50	0
4. Proven and verifiable record of success	Provided positive references and information on 3 or more significant Jenzabar CX implementations.	Has some demonstrated experience with Jenzabar.	Claims of success with little or no evidence. No Jenzabar experience.	0	25	0
5. Flexible roles	Provides the ability to have multiple users access student record as well as one user to multiple students (many-to-many relationship).	Unclear ability to have multiple users access student record as well as one user to multiple students (many-to-many relationship).	Does not provide the ability to have multiple users access student record as well as one user to multiple students (does not support many-to-many relationship).	0	25	0
6. Add Custom Fields	Ability to add custom fields that can be used in packaging process. Fields can be included in system logic to help determine student eligibility and compliance with Title IV regulations.	Limited ability to add custom fields.	Can't add custom fields.	0	25	0
7. Auto Packaging	Ability to automatically package students that are not selected for verification and do not have actionable C codes.	Limited auto packaging.	No auto packaging.	0	25	0
8. Satisfactory Academic Progress (SAP)	Ability to track factors of SAP, calculate student academic progress, and identify students that fail to meet SAP requirements. Tracks SAP appeals, denials and approvals.	Limited SAP functionality.	No SAP functionality.	0	25	0
9. Ability to audit data – actions, communications, and omissions of users	Yes.	Limited.	No.	0	25	0
10. Technology implementation	Database is Informix or Microsoft SQL Server.	Database is MySQL.	Database is proprietary to the solution.	0	25	0
11. Cost of maintenance	Fixed and reasonable.	Variable and difficult to predict for budgeting purposes.	Unreasonable.	0	25	0
12. Cost and ease of integration with existing systems	Fixed and reasonable cost of integration or migration of data to the new financial aid processing system; i.e., Jenzabar CX, OnBase, and CampusLogic. Recent experience integrating with Jenzabar CX.	Unclear cost of integration or migration of data to the new financial aid processing system. No recent experience integrating with Jenzabar CX.	Open-ended cost structure. Unclear path for migration of data.	0	25	0
13. Ability to enter notes/summaries to student portfolios/files	Yes.	Limited.	No.	0	25	0
14. Student segmenting and sorting by award type, date, and status	Yes.	Limited.	No.	0	25	0
15. R2T4 and Overpayment	Ability to easily identify students that have decreased their enrollment status (Half-time, Withdrawn etc.).	Can run a report for changes to student enrollment (12 credits, 9 credits, etc.).	System doesn't connect to registration data.	0	25	0
16. Reconciliation	Ability to easily access student award summaries for COD reconciliation.	Can run reports on student awards.	Difficult or cumbersome reconciliation process.	0	25	0
17. Flexible reporting	Ability to schedule reports to run on a regular basis. Reports can be created in MS Word, Excel, or PDF format.	Ability to run reports, but with little or no automation. Report file formats are limited.	Rigid or inadequate reporting; labor-intensive processes.	0	25	0
18. Timely software upgrades / responsiveness	Quick to respond to changes in federal regulations. Committed to federal compliance.	Slow to respond to changes in federal regulations. Burden of federal compliance placed solely on users.	Not responsive to changes in federal regulations.	0	25	0
19. Dashboard and real-time graphic reports	One click access to most frequently asked questions. Provides a variety of graphs for most FAQs.	Limited graphical access to data. Unclear graphs, difficult to access, or interpret data.	No dashboard or graphic reports available.	0	10	0
20. Context sensitive help	Built in FAQs, context sensitive help, tool tips, video tutorials.	Printed manuals. Requires financial aid staff, IT staff, and administrators to attend training sessions for an extended period of time.	No documentation and help is provided or incomplete help is provided.	0	10	0
21. Communication tools to create email, text, and snail mail documents	Yes.	Limited.	No.	0	10	0
22. Scalability	The system should be scalable. Accommodate the natural growth of the college. Scalability does not require an increase in the cost of hardware or software.	Scalability may require reasonable increase in the cost of hardware or software.	System design is not scalable or requires significant increase in the cost of software or hardware.	0	10	0
23. Cost of supporting software tools and infrastructure	No hidden costs for additional software licensing. Preferably using mature public domain tools and technologies.	Unclear cost structure. Reasonable licensing costs.	Some software applications include a hidden licensing cost (such as having to purchase runtime libraries, database systems, development tools, etc.).	0	10	0
24. Initial software price	Fixed and reasonable	Variable and difficult to predict for budgeting purposes	Unreasonable	0	5	0

25. Cost of hardware and network (servers, network traffic, etc.)	Fixed and reasonable.	Variable and/or unclear costs.	Variable and unreasonable costs.	0	5	0
26. Student schedules – ability to identify financial aid eligible courses.	Yes.	Limited.	No.	0	5	0
				<b>Total</b>	<b>0</b>	
				<b>Score:</b>	<b>138</b>	

## APPENDIX B

### Tentative Evaluation, Award, and Implementation Schedule

Actio	Date
RFP Posted	December 18, 2018
RFP Response	January 15, 2019
Bid Opening	January 16, 2019
Initial Screening of	January 16 – January 25,
Finalists Selected	January 25, 2019
Finalists Make Presentations	January 28 – February 8, 2019
Software Selected	February 11, 2019
Recommendation to	February 12, 2019
DGB Approval	February 19, 2019
60-day Installation	February 20 – April 20, 2019
30-day Trial Period	April 21 – May 21, 2019