



November 25, 2015

TO:

RE: Request for Proposals –Constituent Relationship Management Tool
The University of Alabama in Huntsville
Proposal No. P00108

The University of Alabama in Huntsville is requesting proposals for a Constituent Relationship Management Tool. To obtain a copy of this proposal go to <http://www.uah.edu/business-services/vendors/bid-opportunities>, scroll down and click on the proposal number.

Sealed proposals will be received subject to the Conditions cited herein until 1:30 P.M. on Friday, December 18, 2015. All Requests for Proposals must be furnished to Joy Benefield in Procurement Services, Business Services Building (John Wright Drive), The University of Alabama in Huntsville, Huntsville, Alabama 35899. Proposals may be express mailed to Procurement Services/Proposal P00108, Business Services Building, The University of Alabama in Huntsville, 301 Sparkman Drive, Huntsville, AL 35899.

All proposals must be submitted in a sealed envelope bearing on the outside the name and address of the vendor, proposal number, name of the project, and date.

In the event it becomes necessary to revise any part of this Request for Proposal prior to the assigned return date, revisions will be posted in writing by Procurement Services on our website <http://www.uah.edu/business-services/vendors/bid-opportunities>. The University will be the sole determinant of whether any revisions/addenda should be issued as a result of any questions or other matters, and will extend the proposal deadline if such information significantly amends this solicitation or makes compliance with the original proposal due date impractical.

In order to be considered for selection, vendors must submit a complete response to this request for proposal. One original and one (1) copy of each proposal must be submitted to the University. The vendors shall make no other distribution of the proposals.

No proposal may be amended or withdrawn after the scheduled closing time of receipt for a period of sixty (60) days. The University reserves the right to waive any informality and to reject any and all proposals.

All questions pertaining to this Request for Proposal should be addressed to Joy Benefield via email: Joy.Benefield@uah.edu subject: (Constituent Relationship Management Tool-P00108).

Sincerely,

Joy Benefield
Procurement Officer I,
Procurement Services

REQUEST FOR PROPOSAL AND SPECIFICATIONS

FOR

**CONSTITUENT RELATIONSHIP MANAGEMENT TOOL
(P00108)**

**THE UNIVERSITY OF ALABAMA IN HUNTSVILLE
HUNTSVILLE, ALABAMA 35899**

PROPOSALS TO BE RECEIVED UNTIL: DECEMBER 18, 2015 at 1:30

And Delivered To:

**PROCUREMENT SERVICES
BUSINESS SERVICES BUILDING
THE UNIVERSITY OF ALABAMA IN HUNTSVILLE
301 SPARKMAN DRIVE
HUNTSVILLE, ALABAMA 35899**

**Joy Benefield, Procurement Officer I
Procurement Services
Joy.Benefield@uah.edu**

Request for Proposals P00108

Purpose

The Office of Admissions is seeking proposals for the purchase of a Constituent Relationship Management Tool to be used to maintain an intuitive database that will integrate with our current ERP, Banner, communicate and log the communications, track stages, and provide funnel management statistics on all prospective students in order to gain better insight into the initiatives currently in progress in the recruitment process.

It is essential the technology tool integrate with Banner, provide the means for communications, track all interactions, and provide the ability to run customer reports to inform strategies and track stages. A desired option would include telecounseling for tracking and assignments. Customized communications plan development and deployment are a necessity. Responses should include multiple payment options, in particular options for a 2-3 year payment option.

Event Dates

In order to be considered for selection, vendors must submit a complete response to this Request for Proposal. One original and one copy of each proposal must be submitted to the University. No other distribution of the proposals shall be made by the vendor.

Proposals may be amended or withdrawn by the party(s) submitting such proposal by his/her authorized representative, up until the scheduled opening time. No proposal may be amended or withdrawn after the scheduled closing time of receipt for a period of sixty (60) days.

All proposals must be submitted in a sealed envelope bearing on the outside the name and address of the vendor, **proposal number**, name of the project, and date.

All sealed proposals shall be returned to The University of Alabama in Huntsville, Procurement Services prior to **1:30 P.M. on December 18, 2015**. All Requests for Proposals must be furnished to Joy Benefield in Procurement Services, Business Services Building, located on John Wright Drive, The University of Alabama in Huntsville, Huntsville, Alabama 35899. Proposals may be express mailed to The University of Alabama in Huntsville, Procurement Services, 301 Sparkman Drive, Proposal No. P00108, Huntsville, AL 35899.

Each proposal submitted will be stamped with the time and date of receipt. Any proposal received after 1:30 P.M. will not be considered for an award of a contract.

All questions pertaining to this Request for Proposal should be addressed to Joy Benefield, Procurement Officer I, Procurement Services, via email at Joy.Benefield@uah.edu.

Revisions to the Request for Proposal

In the event it becomes necessary to revise any part of this Request for Proposal prior to the assigned return date, written revisions will be posted by Procurement Services on our website at <http://www.uah.edu/admin/bussvcs/bids.htm> . Scroll down and click on the proposal addendum.

The University will be the sole determinant of whether any revisions/addenda should be issued as a result of any questions or other matters, and will extend the proposal deadline if such information significantly amends this solicitation or makes compliance with the original proposal due date impractical.

"Any contract resulting from this request will be made available to other eligible entities. This may include but is not limited to; The University of Alabama System, comprised of The University of Alabama; The UAB Enterprise, consisting of The University of Alabama at Birmingham, the UAB Health System and their related foundations and affiliates , and The University of Alabama, Tuscaloosa, AL; and other state entities. Contracts resulting from the award of this request cover shipments by any entity listed above. Each entity will generate its own purchase orders, payments, etc. and delivery must be made according to the instructions on the purchase order.

The thrust of the contract is to obtain greater volume price discounts by combining the volume of purchases from participating entities within the State of Alabama."

Ownership of Material

Ownership of all data, material, and documentation originated and prepared for the University pursuant to the Request for Proposal shall belong exclusively to the University.

Proposal Preparation

Proposals shall be signed by an authorized representative of the Vendor. All information requested must be submitted. Failure to comply will result in rejection of the proposal.

Proposals should be prepared simply and economically, providing a straightforward concise description of the Vendor(s) capabilities to satisfy the requirements of the Request for Proposal. Emphasis should be completeness and clarity of content.

Each copy of the proposal should be bound in a single volume. All documentation submitted with the proposal should be bound in or attached to that single document.

Award of Contract

The vendor deemed to be fully qualified and best suited among those submitting proposals will be identified on the basis of the cost and submittal information. Post proposal negotiations may be conducted with any or all vendors including an on-site visit. After evaluations are complete, an award may be made within a ten (10) day period after proposals have been opened. The University shall select and notify that vendor which has in the University's opinion made the best proposal. There is no guarantee an award will be made if it is determined to be in the best interest of the University.

To determine the overall best proposal, the University will utilize an evaluation tool known as the Evaluation Criteria. A list of criteria consisting of percent mark-up, policies, and service will be given a weighted numerical value. Each proposal received will be graded for their response to that requirement, and given a numerical score based on the maximum assigned value. These scores will be combined and considered the numerical value of your response. The proposal with the highest numerical value will be considered the overall best response, and assuming all other requirements are met, may be awarded the contract.

The University reserves the right to request additional information to determine the responsibility of the apparent successful contractor relative to its ability to comply with the terms and conditions of this Request for Proposals.

Modifications, additions or changes to the terms and conditions of this solicitation may be a cause for rejection of your proposal; however, UAH reserves the right to decide, on a case by case basis, in its sole discretion, whether or not to reject such a proposal as non-responsive.

Proposals are evaluated and award decisions are made in the best overall interest of The University of Alabama in Huntsville. The University reserves the right to reject any and all proposals in whole or in part and to waive any informality in the proposal.

The successful vendor will be required to execute a contract in conformance with the provisions of this Request for Proposals. During the period of the contract, no changes will be permitted in any of the conditions and specifications unless the vendor receives written approval from the University.

After the opening of this proposal, the results will not be available to vendors until after an award is made. Tabulations can be reviewed by accessing Procurement Services website at <http://www.uah.edu/business-services/vendors/bid-awards>. Scroll down and click on the proposal number.

As part of the evaluation process, The University of Alabama in Huntsville may schedule in-person presentations. Those vendors will be contacted to schedule presentations.

Fiscal Funding Clause

The continuation of this contract is contingent upon the appropriation of funds to fulfill the requirements of the contract by the legislature. If the legislature fails to appropriate sufficient monies to provide the continuation of a contract, the contract shall terminate on the date of the beginning of the first fiscal year for which funds are not appropriated.

Governing Laws

This Contract, and all matters or issues collateral to it, shall be governed by and construed in accordance with the laws of the State of Alabama.

Certification Pursuant To Act No. 2006-557

Alabama Law (Section 41-4-116, Code of Alabama 1975) provides that every bid submitted and contract executed shall contain a certification that the vendor, contractor, and all of its affiliates that make sales for delivery into Alabama or leases for use in Alabama are registered, collecting, and remitting Alabama state and local sales, use, and/or lease tax on all taxable sales and leases into Alabama. By submitting this bid, the bidder is hereby certifying that they are in full compliance with Act No. 2006-557, they are not barred from bidding or entering into a contract pursuant to 41-4-116, and acknowledges that the awarding authority may declare the contract void if the certification is false.

Evaluation Criteria

This proposal will be awarded using the following criteria:

	<u>POINTS</u>
Integration with ERP.....	25
Customized Communication plan.....	20
General Functionality.....	15
Functional Requirements	10
Mobile Access.....	10
Testing and training methods.....	5
Technical Requirements.....	5
Customer Support	5
Telecounseling Option	5
TOTAL:	100

Desired Functional Requirements and Questions

Section 1: General Functionality and User Interface

Req. Communications

- 1.1.1 Ability to automate the process of scheduling and producing communications
- 1.1.2 Ability to order communications as needed
- 1.1.3 Ability to handle multiple communication requests at one time
- 1.1.4 Ability to create communication flows for prospective students who meet specified criteria
- 1.1.5 Ability to maintain triggers and/or alerts for follow-up or next step activities
- 1.1.6 Ability to move prospects between communication flows at any point based upon a variety of factors

This includes, but is not limited to:

- Geographic area
- Test score range
- Academic interest (up to 15 different interests)
- Ethnicity
- Socioeconomic status
- Intended year of enrollment

- 1.1.7 Ability to quickly implement changes to communication flows and/or strategies

For example, turnaround for adding a new communication to a segment shall be less than one day.

- 1.1.8 Ability to distribute communications to prospects regardless of the communication flow to which that prospect may be assigned
- 1.1.9 Ability for all types of correspondence with prospects to be customized and personalized
- 1.1.10 Capability to track preferred communication modes and setup to deliver accordingly

Req. Contact/Lead Management

- 1.2.1 Ability to record basic contact, biographic, and geodemographic data for prospects

This includes, but is not limited to:

- Name
- Mailing address
- Email address
- Academic qualifier
- High school name and/or code
- Geocode
- Prospect's level of interest
- Other universities prospect is considering
- Predictive enrollment model scores
- Estimated family needs level
- Source of prospect information (i.e. ACT, SAT, NRCCUA, etc.)

1.2.2 Ability to retain multiple test scores by test date

Must be able to extract max score and see all scores

1.2.3 Ability to track contact's high school information

Must be able to import user defined high school codes and store descriptions for user defined high school codes.

1.2.4 Ability to easily maintain a single record for each prospect

1.2.5 Ability to see data changes to data fields on a prospect's record in an audit trail

1.2.6 Contains a mechanism for purging outdated prospect records

1.2.7 Ability to enter contact information manually

1.2.8 Ability to view required information for a prospect on a single screen

This information should include:

- All interactions in chronological order
- Test scores
- Bio/demo information

1.2.9 Ability to prevent the duplication of prospect data

Duplicate checking should be customizable.

1.2.10 Product must record prospect data for approximately 100,000 prospects each year with no degradation of performance.

Req. Data Import

1.3.1 Ability to load prospect data via external file loads

1.3.2 Ability to load prospect data via a web interface

1.3.3 Contains a user friendly integrity review of data imported

1.3.4 Ability to customize search match criteria by data source and import.

Req. Event Management

1.4.1 Ability to provide event management functionality

This functionality should include, but not be limited to:

- Web-based forms
- Import capability
- Participation status

1.4.2 Ability to track information about events and participation

1.4.3 Ability for prospective students to register for events via a self-service web site

1.4.4 Ability to query participants on a variety of criteria necessary for follow-up

For example, to determine which invitees have not responded so that follow-up communication may take place.

1.4.5 Ability to produce and distribute event invitations via e-mail

1.4.6 Ability to distribute via e-mail event confirmations/reminders to those who have registered

1.4.7 Ability to track post-event communication with attendees

Req. *Interaction Tracking*
1.5.1 Ability to record details of all incoming and outgoing communications, regardless of method

Information to be tracked includes, but is not limited to:

- Date of communication
- Communication type
- Purpose of communication
- Identifier of person communicating with prospect
- Department initiating communication
- Result of the communication

Preferred solution will be viewable on one screen, in chronological order.

1.5.2 Ability to track campus visits (academic and non-academic visits) separate from events.

1.5.3 Ability to record details of all prospect participation in university-related activities/events, including special events and campus visits

Section 2: Administrative, Accessibility, and Mobile Functionality

Req. *Administrative Management*

2.1.1 Must contain an ad hoc report tool

2.1.2 Any delivered reports must be able to customized by end users.

2.1.3 Must allow for data exports with filters for manual review

2.1.4 Must allow for customizable dashboards

Examples of information on which to filter information on a dashboard include include, but are not limited to:

- Counselor
- Stage
- Source

2.1.5 Ability to provide an audit trail on all fields.

Req. *Browser Compliance*

2.2.1 Must support most recent versions of Internet Explorer, Firefox, Opera, Safari, and Chrome

Req. *Security*

2.3.1 Does your company have a security policy? If so, please provide a copy.

2.3.2 Does your company have a dedicated security team? If so, how many people are on it? Do they review service / application updates?

2.3.3 Is there a formal procedure for reporting a security violation?

2.3.4 Are your systems subjected to penetration tests? Is testing performed by internal personnel or outsourced? When was the last penetration test? What were the results?

2.3.5 Does your company scan and/or test for vulnerabilities in your service / application, and if so, how quickly are any identified vulnerabilities mitigated?

2.3.6 How often do you upgrade your service / application? How do you test the upgrade before deployment?

2.3.7 What are your terms when it comes to ownership of data?

2.3.8 If service is discontinued, how is data exported and removed from service / application?

- 2.3.9 Where is customer data stored?
- 2.3.10 Who has access to customer data and how are they vetted?
- 2.3.11 Are your data storage facilities compliant with US export control regulations such as International Traffic in Arms Regulations (ITAR)?
- 2.3.12 How do you secure access to your data facilities where customer data is stored?
- 2.3.13 Is data fully deleted when deleted from the service / application?
- 2.3.14 Does your organization utilize OWASP Testing Guide and / or OWASP Code Review Guide? If not, what methodologies are utilized?
- 2.3.15 Do you have a documented process for how system, application and data backups are performed? If so, please provide a copy.
- 2.3.16 What is your backup and recovery SLA? Have these been met in the past 12 months?
- 2.3.17 Is there a disaster recovery / business continuity strategy in place? How often is it tested? How is it tested?
- 2.3.18 How is data encrypted in transit and storage?
- 2.3.19 How is authentication performed in the service / application?
- 2.3.20 Do you provide the ability to use outside authentication such as SSO technologies?
- 2.3.21 Does your service / application provide different levels of access? If so, how are they defined?
- 2.3.22 Does your service / application support logging to external sources? If so, what levels of logging are provided?

Section 3: Implementation, Training, Migration, and Documentation

Req. Imports to CRM

- 3.2.1 A method to import external files with specified fields must be provided at implementation
- 3.2.2 A web interface to upload information must be provided at implementation

Req. Technical Support

- 3.3.1 Test and Production environments required to be implemented by the vendor.
- 3.3.2 After implementation, support for these environments must be provided by the vendor.

Req. Training

- 3.4.1 Training must be provided to facilitate a product-knowledgeable functional team

Section 4: Associated Questions

Question Administrative Management

- 4.1.1 Explain method/mechanism for purging outdated prospective student records.
- 4.1.2 Describe how all interactions with a student can be accessible via a single screen in the CRM.
- 4.1.3 Describe how the method/mechanism used by the CRM to prevent the duplication of prospect data during data import

Question Communications

- 4.2.1 Describe how the process to customize communications works.

Question Contact/Lead Management

4.3.1 Regarding the no performance degradation requirement, provide examples of installation with similar size incoming records, including the time it takes to access a prospective student's record.

Question Event Management

4.4.1 Explain how the CRM is able to distribute via e-mail event confirmations/reminders to those who have registered.

Question General

4.5.1 Describe the features/benefits of the following CRM components

- Communications
- Contact/Lead Management
- Data Import
- Event Management
- Interaction Tracking

Question Implementation

4.6.1 Identify if the implementation services are provided by a third party.

Question Training

4.7.1 Describe the training to be provided:

- On-site or off-site
- In person or through webinar
- Recurring schedule or as needed
- Paper or electronic software manual

Desired Technical Requirements and Questions

Section 5: Banner and Third Party Integrations

- Req. Authentication at Industry Standards*
- 5.1.1 Ability to support SSO authentication and authorization using Shibboleth and/or CAS
 - 5.1.2 Ability to allow for administrative "backdoor" access outside of SSO integration restraints
 - 5.1.3 Ability to support authentication using LDAP and Active Directory
 - 5.1.4 Ability to support external and internal authentication
- Req. ERP Integration*
- 5.2.1 CRM integrates with ERP (Ellucian Banner) through a recognized and continually supported interface.
 - 5.2.2 SIS API allows for both batch and real-time data transfer
 - 5.2.3 SIS API allows for two-way data transfer; to include test score transfers
 - 5.2.4 UAH will have access to back-end functions, database, and log files through the administrative interface or by other means
 - 5.2.5 CRM supports SSL

Section 6: Hosting Services and Support

- Req. Client Support*
- 6.1.1 Vendor provides CRM support options; including SLA's and 24 x 7 phone support for CRM administrators
 - 6.1.2 CRM will assign a client representative to work with the UAH account
 - 6.1.3 Vendor provides Service Level Agreement with prescribed response and resolution times
 - 6.1.4 Multiple CRM administrators can access client support
 - 6.1.5 Vendor provides ticketing/tracking system for CRM issues
 - 6.1.6 Vendor provides client-side forums and knowledge base articles
 - 6.1.7 Vendor provides information on requirements for functional users' desktop and/or laptop computers, phones, and tablets

This information should include:

- Hardware
- Software
- Browser

- Req. Concurrent Users*
- 6.2.1 Ability to scale the implementation for increased usage
 - 6.2.2 CRM provides for unlimited concurrent users/sessions

- Req.* *Hosting*
- 6.3.1 Vendor provides detailed requirements of available deployment environments (SaaS, hosted, and/or onsite)
- These requirement information to be provide should include
- Hardware
 - Software
 - Storage
 - Database
- 6.3.2 For SaaS or hosted solutions, vendor provides outline of uptime and downtime, as well as access to query the database.

Section 7: Associated Questions

Question *Banner Integration*

- 7.1.1 Describe whether the Ellucian Banner interface is standard or customized, and whether it is batch or real-time. Would such an interface be two-way and by what means would the frequency or data exchange be defined? What security protections are afforded by the interface?
- 7.1.2 Describe past success(es) interfacing your Higher Education CRM solution with Ellucian Banner. Examples should represent clients currently using a CRM that is the same, or very similar to, the solution being proposed for The University of Alabama in Huntsville. What was the most difficult implementation and why? Explain how you overcame specific challenges.
- 7.1.3 Provide a roadmap specific to the interface with Ellucian Banner.
- 7.1.4 If the solution's interface to Banner is not standard, please provide information related to any additional costs for such an interface to be provided and any expectations of the University's technical staff to facilitate its implementation.

Question *General*

- 7.2.1 Do you offer an API and software developer's tool kit for use by the institution's technical staff? If so, describe how you deliver this solution.
- 7.2.2 Describe the ability to add fields and tables to the database for local needs (based upon hosting option.)
- 7.2.3 How does the product handle U.S. postal address validation?
- 7.2.4 Does this solution come with a comprehensive data dictionary of the database?
- 7.2.5 Describe how the vendor and/or client may monitor system performance.

Question *Hosting*

- 7.3.1 Describe your SaaS, hosted, and/or onsite deployment environments options.
- 7.3.2 Detail how multiple CRM instances (test, development, and production) would be provided.

- 7.3.3 We require policies and procedures which insure the integrity of University data in case of system failure. Explain your backup and disaster recovery policies.
- 7.3.4 If your solution is not web-based, how will users securely access the system remotely?
- 7.3.5 Please explain the process involved for refreshing the data between CRM instances.

Question Mobility Support

- 7.4.1 What mobile platforms are supported by the CRM solution?
- 7.4.2 How are mobile capabilities implemented? (i.e. mobile-enabled, apps, etc.)
- 7.4.3 How and when are mobile updates provided?

Question Updates/Releases

- 7.5.1 How often is the software updated and releases made available?
- 7.5.2 Define the documentation and ongoing support provided related to updates and/or releases.
- 7.5.3 What release/version are you proposing for the University? When is the next release/version due out?
- 7.5.4 Explain how patches or updates released during implementation would be handled. Describe the change management process.
- 7.5.5 Who is responsible for installing patches, updates and releases?

General Terms and Conditions for This Contract

Hold Harmless Clause

The vendor must agree “To hold harmless” the State of Alabama, Board of Trustees of the University of Alabama System, and employees of the University of Alabama in Huntsville, against claims arising out of the actions of any person in the use or administration of this program.

Permits, Licenses, Taxes and Certificate of Authority

The vendor shall, at its sole expense, procure and keep in effect all necessary permits and licenses required for its performance under this Contract, and it shall post or display in a prominent place such permits and/or notices as are required by law.

The vendor must include with their proposal a certification of authority to conduct business in the State of Alabama.

The vendor shall be responsible for and pay when due any and all taxes and assessments arising out of the operation including, but not limited to, payroll taxes (including all deductions of employees) and income taxes.

The vendor shall comply with the provisions of all applicable statutes and regulations of taxing authorities to which it is subject.

Applicable Law

It is agreed this proposal is valid to the extent that it does not violate the constitution or the laws of the State of Alabama.

Vendor represents and warrants that all article and services covered by this proposal meet or exceed the safety standards established and promulgated under the Federal Occupational Safety and Health Act of 1970, No. 2006, and its regulations in effect or proposed as of the date of this proposal.

The vendor agrees that it shall not, with respect to any activity carried out on the premises of the University or relating in any way to this Contract, discriminate unlawfully against any person on the basis of race, color, national origin, religion, sex, age, handicap or disability. The equal opportunity clause required under Executive Order 11246 date September 28, 1965 issued by the President of the United States of America, and Public Law 88-352, 88th Congress, the “Civil Rights Act of 1964” and regulations issued thereunder are made a part of this Contract by reference.

Contract Cancellation

If the vendor fails to fulfill its contract obligations, the University may give the vendor written notice of its failure to perform, and if the vendor fails to correct the default within thirty (30) days, the University, by written notice, may terminate the contract after an additional thirty (30) days.

Assignment

No contract may be assigned; sublet or transferred without the written consent of the University.

Insurance Obligations Including Worker's Compensation and Comprehensive General Liability

The vendor shall maintain in force at all times during the term of this Contract, with responsible insurance carriers, the following insurance: (a) workmen's compensation insurance, to the extent coverage is required by law for the Contractor, in the amount of the statutory limits; and (b) public liability insurance in the amount of \$1 million. The contractor shall provide annually a Certificate of Insurance to the University with respect to foregoing coverages.

University Name – Limitations on Use

The vendor shall not use, in its external advertising, marketing programs, or other promotional efforts, any data, pictures, or other representation of the University except on the specific written authorization of the University's Vice President for Finance and Administration. However, the vendor shall be allowed to include the University on its routine client list for matters of reference.

Non-Collusion

Any agreement or collusion among vendors or prospective vendors in restraint of freedom of competition, by agreement to bid at a fixed price or to refrain from bidding, or otherwise, shall render the proposals of such vendors void. Each vendor certifies that he has not been a party to such an agreement by signing this request for proposal.

Proposals are Public Record

All proposals become a matter of public record at proposal award. The University accepts no responsibility for maintaining confidentiality of any information submitted with proposal whether labeled confidential or not.

Disclosure Statement

Vendors are required to file with Procurement Services a disclosure statement of relationship between contractors/grantees and employees/officials of the University. This form must be completed and included in proposal response.

Note: In order for an alternate bid to be considered, bidders must supply current catalogs or brochures, including pictorials and specifications.

F.O.B. Point	TERMS	WARRANTY
UAHUNTSVILLE DESTINATION		
ESTIMATED DELIVERY	YOUR REFERENCE NO.*	QUOTATION EFFECTIVE UNTIL
BUSINESS CLASSIFICATION (see note below):	EMAIL ADDRESS:	

* Your company reference number, if applicable with this bid quotation.

NOTE: Please indicate your company classification in the appropriate box above: Small Business (**SB**), a Small Disadvantaged Business (**SD**), a Black Small Disadvantaged Business (**BD**), a Woman-Owned Small Business (**WB**), a Woman-Owned Small Disadvantaged Business (**WD**), a Black Woman-Owned Small Disadvantaged Business (**BW**), a Large Business (**LB**), an Individual (**IN**), Educational (**ED**), Non-Profit (**NP**), a Labor Surplus Area Concern (**LS**), Disabled Veteran-Owned Small Business (**DV**), Veteran-Owned Small Business (**VS**), Historically Underutilized Business Zone (**UZ**), or a Governmental Agency (**GV**).

Certification Pursuant To Act No. 2006-557

Alabama Law (Section 41-4-116, Code of Alabama 1975) provides that every bid submitted and contract executed shall contain a certification that the vendor, contractor, and all of its affiliates that make sales for delivery into Alabama or leases for use in Alabama are registered, collecting, and remitting Alabama state and local sales, use, and/or lease tax on all taxable sales and leases into Alabama. By submitting this bid, the bidder is hereby certifying that they are in full compliance with Act No. 2006-557, they are not barred from bidding or entering into a contract pursuant to 41-4-116, and acknowledges that the awarding authority may declare the contract void if the certification is false.

COMPANY NAME (TYPE OR PRINT)

TELEPHONE NUMBER

SIGNER'S NAME (TYPE OR PRINT)

FAX NUMBER

SIGNATURE

DATE

The University of Alabama in Huntsville prohibits the installation of asbestos on its campus. Suppliers and contractors will not supply any equipment, material, or supplies, which contain asbestos without prior written approval.

Failure to designate Bid Number and Opening Date on the outside of your sealed envelope containing your bid and more than one bid submitted in this envelope will result in a "No Bid" response in accordance with Alabama Competitive Bid Law 41-16-24 sub-part b.

The University of Alabama in Huntsville will not accept faxed bids.

Any product that fails to meet the specifications, performance requirements or compatibility requirements will be rejected and returned to the vendor at no cost to the University.

State of Alabama Immigration Law

If the successful bidder is located in Alabama or employs an individual or individuals within the State of Alabama, the successful bidder shall provide a copy of its Employment Eligibility Verification (E-Verify) company profile. To expedite the ordering process, this document may be submitted with the bid response.

If the successful bidder is not located in the State of Alabama and does not employ an individual or individuals within the State of Alabama, the successful bidder shall complete and return the Certification of Compliance form included with this Request for Price Quotation (E-Verify company profile is not required). To expedite the ordering process, this document may be submitted with the bid response.

If you are not currently enrolled in E-Verify, follow these instructions:

- Log onto www.uscis.gov/everify
- Click “Getting Started” for information about the program, requirements, and enrollment process.
- Click “Enroll in E-Verify” and begin enrollment process.
- When enrollment process is complete, click “Edit Company Profile” and print this one-page document.
- This one-page document must be submitted prior to a contract or purchase order being issued.
- For further assistance please consult the [E-Verify Quick Reference Guide](#).

If you have previously enrolled in E-Verify, follow these instructions:

- Log onto www.uscis.gov/everify
- Click “Edit Company Profile” and print this one-page document.
- This one-page document must be submitted prior to a contract or purchase order being issued.



CERTIFICATION OF COMPLIANCE WITH THE STATE OF ALABAMA IMMIGRATION LAW

The undersigned officer of _____ (Company) certifies to the Board of Trustees of the University of Alabama that the Company is not located in Alabama and that the Company does not employ an individual or individuals within the State of Alabama.

SIGNATURE OF COMPANY OFFICER

PRINT COMPANY NAME

PRINT NAME OF COMPANY OFFICER

PRINT TITLE OF COMPANY OFFICER

DATE

**DISCLOSURE STATEMENT OF
RELATIONSHIP BETWEEN CONTRACTORS/GRANTEES AND
EMPLOYEES/OFFICIALS OF UA/UAB/UAHuntsville/UAS
(THE "UNIVERSITY OF ALABAMA SYSTEM")**

1. Contract # P00108

2. Name of Contractor/Grantee _____
Address _____

Phone _____

3. Nature of contract/grant
Constituent Relationship Management Tool

4. Does the contractor/grantee have any relationship with an employee or official of the University, or a family member of such employee or official, that will enable such employee or official, or his/her family member, to benefit from this contract/grant? If so, please state the names, relationships, and nature of the benefit.

(For employees of the University, family members include spouse and dependants. For members of the Board of Trustees (officials), family members include spouse, dependants, adult children or their spouses, parents, in-laws, siblings, and their spouses.)

Certification Pursuant To Act No. 2006-557

Alabama Law (Section 41-4-116, Code of Alabama 1975) provides that every bid submitted and contract executed shall contain a certification that the vendor, contractor, and all of its affiliates that make sales for delivery into Alabama or leases for use in Alabama are registered, collecting, and remitting Alabama state and local sales, use, and/or lease tax on all taxable sales and leases into Alabama. By submitting this bid, the bidder is hereby certifying that they are in full compliance with Act No. 2006-557, they are not barred from bidding or entering into a contract pursuant to 41-4-116, and acknowledges that the awarding authority may declare the contract void if the certification is false.

This disclosure form will be available for public inspection upon request.

The above information is true and accurate, to the best of my knowledge.

Signature of Authorized Agent

Date

This form must be completed and returned before any contract(s) will be issued by the University.