Office Related Products (ORP) Request for Proposal

RFP#: PS0001

Date of Issuance: Wednesday, December 19, 2018
Proposal Due Date: Friday, January 25, 2019

RFP Contact Information:
Snow Rutkowske, Director of Procurement Services
Illinois Institute of Technology
Phone: 312.567.3677
Email: srutkowske@iit.edu
Table to Content

Illinois Institute of Technology Background.................................................Page 3
RFP Objectives..................................................................................................Page 3
RFP Schedule of Events ...............................................................Page 4
Scope of Work ..............................................................................................Page 5
Proposal Instruction and Format ..........................................................Page 7
Proposal Evaluation Process...............................................................Page 8

Attachments:

Attachment A: General Requirements Proposal (Excel Document)
Attachment B: Financial Proposal (Excel Document)
Attachment C: Illinois Institute of Technology Conditions of Purchase
Attachment D: Illinois Institute of Technology Insurance Requirements
Attachment E: Debarment and Suspension Form
Illinois Institute of Technology Background

Founded in 1890, Illinois Institute of Technology (Illinois Tech, the University) is a private, Ph.D.-granting research university with programs in engineering, sciences, architecture, psychology, design, humanities, business, and law. Illinois Tech's inter-professional, technology-focused curriculum is designed to advance knowledge through research and scholarship, to cultivate invention improving the human condition, and to prepare students throughout the world for a life of professional achievement, service to society, and individual fulfillment.

Mission: To provide distinctive and relevant education in an environment of scientific, technological, and professional knowledge creation and innovation.

Vision: Illinois Tech will be internationally recognized in distinctive areas of education and research, using as its platform the global city of Chicago, driven by a professional and technology-oriented focus, and based on a culture of innovation and excellence.

More information about Illinois Tech and its operation, mission and structure can be found on our Website – www.iit.edu and http://www.iit.edu/about/quick_facts.shtml. Respondents are encouraged to review this information before submitting their proposals.

RFP Objectives

As part of the broader Illinois Institute of Technology’s Strategic Improvement Initiative, Procurement Services is tasked with:

- the modernization of procurement related technologies and processes,
- the transformation into an organization that collaborates with campus to improve customer services, and
- the creation of added value through university-wide strategic contracting and spend consolidation.

The University is currently implementing an eProcurement solution, Unimarket, that would help us automate and streamline various purchasing, vendor management, contract management and invoicing processes, as well as reduce the administrative costs of our vendor partners of doing business with the University. This solution will also provide a user friendly, online shopping experience for campus end users when they purchase products from the University’s Preferred Suppliers via their punch-out catalogs in the e-marketplace.

The key objective of this Office Related Products RFP is to identify one or more Preferred Suppliers to the University who can provide quality products, market competitive pricing and market-leading customer service for our office-related products spend, including general supplies, breakroom products, toner products, copy paper, and similar items. The awarded vendor(s) will be:

- Established as a University Preferred Supplier and setup as a punch-out supplier in our eProcurement solution.
- Offered a mutually beneficial university-wide contract with an initial term of 5-years and 2 optional 1-year extensions.
- Actively promoted to campus end users to drive vendor adoption and spend.

The University currently spends approximately $300K+ annually on office-related products with its spending spread across at least five separate suppliers.1 It is the University’s goal to consolidate its spend with a single, qualified Preferred Supplier for office-related products; the University reserves the right, however, to award to multiple vendors if it is in the University’s best interest to do so after proposal review and evaluation.

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1 This figure is provided for informational purposes only. It is not and is not intended to constitute any guarantee as to price and/or quantity.
RFP Schedule of Events

Please carefully review and follow the RFP schedule of events below:

<table>
<thead>
<tr>
<th>Description</th>
<th>Date / Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Release</td>
<td>Wednesday, December 19, 2018</td>
</tr>
<tr>
<td>Pre-Bid Vendor Conference Call</td>
<td>Monday, January 7, 2019, 3pm – 4pm CST</td>
</tr>
<tr>
<td>Emailed Intent to Propose</td>
<td>Wednesday, January 9, 2019, before 5pm CST</td>
</tr>
<tr>
<td>Vendor Questions Due Date</td>
<td>Friday, January 11, 2019, before 5pm CST</td>
</tr>
<tr>
<td>Response to Vendor Questions Distributed</td>
<td>Monday, January 14, 2019, before 5pm CST</td>
</tr>
<tr>
<td>Emailed Proposal Submission Due Date</td>
<td>Friday, January 25, 2019, before 5pm CST</td>
</tr>
<tr>
<td>Target RFP Award Date</td>
<td>Thursday, February 28, 2019, before 5pm CST</td>
</tr>
</tbody>
</table>

- **Pre-Bid Vendor Conference Call**: Vendors are strongly encouraged to attend the pre-bid vendor conference call scheduled for **Monday, January 7, 2019 from 3pm to 4pm CST**. The conference call is an opportunity for respondents to better understand the RFP process and the scope of services requested. Participation in this conference call is not mandatory. Conference dial-in information is as follows:
  
  **Conference Dial-In**: 1-302-202-1112  
  **Conference Pass Code**: 512120

- **Emailed Intent to Propose**: Vendors who intend to submit a proposal **MUST** indicated in writing their intent to do so by email to Snow Rutkowske (srutkowske@iit.edu), Director of Procurement Services, **no later than 5pm CST on Wednesday, January 9, 2019**. Illinois Tech reserves the right to reject any proposal from a vendor who did not first submit an intent to propose or who failed to submit such intent to propose on a timely basis.

- **Vendor Questions Due Date**: Any additional questions that a respondent may have and that were not addressed during the pre-bid conference call may be submitted to Snow Rutkowske (srutkowske@iit.edu), Director of Procurement Services, **by 5pm CST, Friday, January 11, 2019**. Questions received after this time will not be addressed.

- **Response to Vendor Questions**: Response to vendors’ questions will be distributed on Monday, January 14, 2019 before 5pm CST via email.

- **Emailed Proposal Submission Due Date**: All proposal submissions **MUST** be sent via email to Snow Rutkowske (srutkowske@iit.edu), Director of Procurement Services, and received by the University **no later than 5pm CST on Friday, January 25, 2019**. Submissions received after this date and time will not be accepted.

- **Target RFP Award Date**: Illinois Tech aims to complete all proposal review and evaluation, and to complete subsequent negotiation activities and announce the award(s) by February 28, 2019. Illinois Tech reserves the right to adjust this date in its sole discretion and will endeavor to communicate any delays or extensions of award(s) decision to all respondents.
Scope of Work

A. **Contract Term**: 5-year initial contract term with two (2) optional one (1) year extensions.

B. **Target Contract Effective Date**: March 2019, exact date TBD pending RFP award and contract review and finalization.

C. **Termination Without Cause**: The University reserves the right to terminate the agreement without cause and without penalty or further payment upon sixty (60) days’ prior written notice. Upon exercise of this right, Illinois Tech shall pay for supplies and services satisfactorily provided up to the time of termination.

D. **Technology Requirement**: All respondents **MUST** be able to integrate with the University’s eProcurement solution, Unimarket, and provide the University with a punch-out catalog, as well as receive electronic orders and submit electronic invoices in cXML format. The University is targeting mid- to late-April 2019 for a pilot group go-live of Unimarket, and due to this tight timeline, any awarded vendor(s) must be ready and able to work on integrations with Unimarket as soon as award selection and announcement. Vendors unable to integrate with the eProcurement solution will be considered nonresponsive and will be rejected.

E. **Preferred Supplier Status**: Once awarded, the vendor(s) will be designated as Illinois Tech’s Preferred Supplier and will be featured prominently in the University’s eProcurement marketplace and on the Procurement Services’ website. The University will also actively promote the Preferred Supplier to campus users and drive vendor adoption and spend consolidation. As the Preferred Supplier, the vendor will also get the opportunity to host vendor shows and other promotion events on campus, and the potential opportunity to further collaborate with Procurement Services and the University to expand the mutually beneficial relationship beyond the initial scope of this RFP.

F. **Market Competitive Pricing and Discounts**: Respondents shall provide the University with market competitive product pricing throughout the entire duration of the contract term. This should include a net priced Core List of the University’s most frequently purchased and high spend items and a general category discount structure that would cover products not on the Core List.

G. **Core List Item Annual Review and Adjustment**: The vendor must include in its proposal a core list of office supply items (the “Core List”). The pricing for the Core List will be set for the first year during the term of the agreement. Thereafter, the vendor agrees that items on the Core List and Core List item pricing will be jointly reviewed and adjusted by mutual agreement of the vendor and the University once annually, ideally at the beginning of each year during the contract term. Core item pricing shall not be modified during any other time of the year and any exceptions must be reviewed and agreed to by Procurement Services on a case-by-case basis.

H. **Technology Fee**: Illinois Tech is implementing an eProcurement solution which will help us better drive spend to our enabled punch-out Preferred Supplier(s) and reduce our vendor’s cost of doing business with us through streamlined and automated processes. We ask all of our preferred punch-out vendors to provide us with a Technology Fee of 1.5% at a minimum for all spend that goes through the punch-out site, payable to the University on a quarterly basis.

I. **In-Scope Products**: The In-Scope product categories of this particular RFP include, but are not limited to general office supplies such as binders, folders, envelopes, toner products (original equipment manufacturer and remanufactured), paper (white copy paper and others), and similar office supply products.

J. **Account and Customer Service Management**: The vendor shall provide the University with a dedicated Account Management and Customer Service team with a single point of contact. This team of professionals shall provide market-leading customer service to our university end users and collaborate with Procurement Services to promptly address and resolve any issues related to purchasing office supplies.

K. **Financial Incentives**: The vendor shall provide the University with various financial incentives warranted by the University’s account size, Preferred Supplier status, and length of contract commitment. Examples of financial incentives include, but are not limited to, upfront or milestone contract signing incentive, volume rebate, growth rebate, scholarships and internships.
L. **Product Substitutions:** The vendor shall not replace any ordered product with an alternative product without first obtaining approval of the ordering customer. Similarly, should any Core List items become discontinued, the vendor shall promptly notify Procurement Services and any replacement items will be jointly reviewed and agreed upon. There shall be no automatic replacement of Core List items.

M. **Shipping and Delivery:** The vendors shall provide Illinois Tech with F.O.B. destination, next day desktop product shipping / delivery free of charge without a minimum order placement dollar threshold. The vendor shall also provide a packing slip for every product delivery. The packing slip must include, at a minimum, the following information: customer name, address, phone #/email address, line item description, quantity ordered, quantity shipped, backordered products with expected delivery date, unit price, # of parcels, and the University's purchase order number.

N. **Product Returns/No Stocking Fee:** The vendor shall provide full credit and no restocking fee to the University on all returns initiated within forty-five (45) days of delivery for products that are in their original packaging and in sellable condition.

O. **Settlement Method and Term:** The vendor shall accept the University's preferred payment term of 20 days after invoice date via ePayables or a card payment program. Credit card merchant fees that otherwise may apply shall not be added to the invoice issued to the University or otherwise charged to the University.

P. **Reporting:** The vendor shall provide the University with detailed transactional usage reporting on a quarterly basis or upon request. At a minimum, the vendor needs to be able to provide a comprehensive transactional usage report in Excel format inclusive of, but not limited to, the following data fields:

   a. Order date  
   b. Order number  
   c. Invoice date  
   d. Invoice number  
   e. Vendor part number  
   f. Manufacturer SKU Number  
   g. Manufacturer name  
   h. Item description  
   i. Contract category / subcategory  
   j. Quantity purchased  
   k. UOM  
   l. Unit price paid  
   m. Unit list price  
   n. If the item was a core item

Q. **Quarterly Business Review:** The vendor shall attend Quarterly Business Review Meetings with Procurement Services and must be able to provide business review reports showing key account performance metrics, including but not limited to, quarterly spend, cumulative annual spend / spend since contract inception, spend on core items, number of orders, number of returns, and spend through punch-out site vs. non-catalog purchases.

R. **Contract Compliance Audit:** Procurement services will perform periodic contract pricing and discount compliance audit. If any discrepancies or non-compliances are found, the vendor shall promptly address the root cause of the non-compliance and issue appropriate credit to the University.

S. **Sustainability:** Illinois Tech supports and encourages initiatives to protect and preserve our environment. The vendor shall provide products with recycled content, such as copy paper, toner, and more environmentally friendly packing, shipping material for the University and end users’ consideration.
T. **Vendor Diversity:** Illinois Tech supports and encourages utilization of minority, diverse and local business enterprises. The vendor shall provide the University with applicable diverse/minority vendor status certification if applicable (self-certification is not accepted), tier 2 diverse/minority vendor spend reporting, and any programs or opportunities for partnership with diverse/minority vendors within the contract scope.

U. **Value Added Services:** As the Preferred Supplier of the University, the vendor is expected to provide and collaborate with Procurement Services on value added services, in addition to market competitive pricing and excellent customer services, including but are not limited to cost savings initiatives, product standardization and consolidation, sustainability programs, process improvement initiatives.

**Proposal Instruction and Format**

A. **Proposal Submission:** The RFP Schedule of Events outlined above must be strictly followed and the completed proposal packet **MUST** be submitted **electronically via email** in a zipped file to Snow Rutkowske (srutkowske@iit.edu), Director of Procurement Services, and **received no later than 5pm CST, Thursday, January 25, 2019.** Submissions received after this date and time will not be considered or evaluated.

B. **Proposal Component and Format:** Vendor’s proposal response packet **MUST** include the following components in the specified format in order to be considered complete and valid. All proposal related documents must be combined in a zipped file and submitted via email.

1. **Signed Proposal Cover Letter: PDF Format**
   The Cover Letter should specify the services for which the vendor is submitting a proposal, a commitment to provide these products and perform these services in accordance with this RFP, and a summary as to why the vendor believes itself the best qualified to provide the products and services, including any relevant prior experience in this area. The Cover Letter should also contain a certification that (i) all information provided in connection with your proposal is true and accurate as of the date of its submission, and (ii) if any of the information subsequently becomes (or is discovered to be) false or inaccurate, you will promptly notify the University. **The Cover Letter should be kept to one (1) page and must be signed by an authorized officer of the vendor company.**

2. **General Requirements Proposal (Attachment A): MUST be in original MS Excel Format**
   The vendor must carefully review and complete the separate Excel Attachment A: General Requirements Proposal workbook; this workbook contains the University’s requirements and questions regarding vendor information, references, B2B integration capabilities, order support, shipping and delivery, account support and management, and value added services, all separated by tabs. Vendors are encouraged to be detailed and concise in their response to each question.

3. **Financial Proposal (Attachment B): MUST be in original MS Excel Format**
   The vendor must carefully review and complete the separate Excel Attachment B: Financial Proposal workbook; this workbook asks for the vendor’s proposal for Core List items, general discount, market basket analysis, and financial incentives in various tabs. Detailed instructions are provided in the workbook and in each of the various tabs.

4. **Debarment and Suspension Form: PDF Format**
   The vendor must carefully review, complete, and sign Attachment E: Debarment and Suspension Form and return it as part of the RFP proposal packet.

5. **Supplemental Attachments: PDF Format**
   The vendor may choose to provide additional information and support documents in PDF format to supplement the required proposal, including but not limited to certification of minority/diverse vendor status, any additional product and service offerings that the vendor can provide, and that may be relevant to the subject matter of this RFP.
C. **Proposal Firm Time:** The vendor’s initial proposal and any subsequent proposal updates during the negotiation process shall remain firm for ninety (90) days from proposal submission. The University reserves the right to reject any or all proposals or any part thereof, or to accept any proposal, or any part thereof, or to withhold the award and to waive or decline to waive irregularities in any proposal when it determines that it is in its best interest to do so. All proposals and accompanying documentation will become the property of the University at the time the proposals are opened.

D. **Modification or Withdrawal of Proposal:** Written email requests to modify or withdraw a proposal prior to the stated proposal due date and time will be accepted. No oral requests will be allowed.

E. **Questions:** All RFP related questions must be addressed to Snow Rutkowski (srutkowske@iit.edu), Director of Procurement Services via email. Questions received less than 7 days prior to the due date may be answered at the discretion of the University. Written answers to questions of a general nature or which would affect the solicitation will be provided to all recipients of the solicitations who have submitted an Intent to Propose via email. Only written answers to questions will be binding.

F. **Responsibility to Read and Understand:** The vendor’s failure to read, examine, and understand the solicitation will not excuse any failure to comply with the requirements of the solicitation or any resulting agreement, nor shall such failure be a basis for claiming additional compensation. If you suspect an error, omission, or discrepancy in this solicitation you must immediately notify the University's RFP Contact Person. The University will issue additional written instruction or clarification, if appropriate.

G. **Cost of Proposal Preparation:** The University is not responsible for and will not pay any costs associated with the preparation and submission of the vendor’s proposal. All proposals become the property of the University and will not be returned except in the case of a late submission.

H. **Presentations and Inspections:** The vendor must provide a formal presentation of the proposal upon request.

I. **Negotiations and Best & Final:** The University reserves the right to engage in negotiations including requesting best & final proposals if deemed appropriate, and will determine the scope and subject of any subsequent negotiations and best & final request. However, the vendor should not assume that the University will automatically provide an opportunity for you to strengthen your proposal; therefore, the vendor should submit your best proposal based on the terms and condition set forth in this solicitation.

J. **Non-Discrimination Policy:** In compliance with all applicable federal and state laws and regulations, the University does not unlawfully discriminate in employment, contracts, or any other activity.

K. **Payment Card Industry Data Security Standard:** For e-commerce business and/or payment card transactions, a vendor will comply with the requirements and terms of the rules of all applicable payment card industry associations or organizations, as amended from time to time (PCI Security Standards), and be solely responsible for security and maintaining confidentiality of payment card transactions processed by means of electronic commerce up to the point of receipt of such transactions by a qualified financial institution.

**Proposal Evaluation Process**

A. An RFP Committee will be convened to review and evaluate the proposals. The RFP committee will consist of the Procurement Services office and key departmental end users.

B. The RFP Committee will evaluate the proposals based on the following high level criteria, listed in no particular order of priority or weight:

1. **Administrative Compliance:** Whether the proposal complied with the RFP instructions for submission, proposal components and format.

2. **Vendor Responsibility:** Whether the vendor submitting the proposal is one with whom the University can and should do business. Factors the University employs to evaluate a vendor’s responsibility include, but are not limited to, conflict of interest disclosures, past performance, strength and applicability of references (including those found outside the proposal), financial stability, and the perceived ability to perform satisfactory the RFP scope of work as specified.
3. **Service Level**: Whether the vendor is able to provide the University end users with satisfactory level of services, including, but not limited to, order status notifications, shipping terms, ease of return / credit, assistance with customer questions, product needs and issue resolutions.

4. **Financial Proposal**: Whether the vendor is able to provide the University with market competitive pricing and discounts, as well as favorable financial incentives.

5. **Account Management and Support**: Whether the vendor is able to provide the University with satisfactory level of account management and support, including, but not limited to, agreeing to the University’s preferred payment method and terms, accurate and efficient billing process, issue resolution, reporting capabilities, collaboration with the University to promote the contract and vendor relationship if awarded.

6. **Preferred Supplier Partnership and Value Added Services**: Whether the vendor is capable of being a successful Preferred Supplier partner for the University and provide the University with products and programs that promote sustainability, attend Quarterly Business Review meetings, provide the University with the minimum 1.5% Technology Fee, ability to collaborate with the University on further cost savings and process improvement initiatives.

C. The vendors are **prohibited** from discussing the details of the RFP or to make inquiries of the proposal review status with anyone at the University, particularly members of the RFP Committee and current customers, except Procurement Services. Any vendor who is found to be non-compliant will be disqualified and removed from consideration.

D. After initial review and evaluation, the RFP Committee will score and rank the proposals received and may identify a short list of vendors to engage in further proposal clarifications and negotiations. The vendor will be notified in writing if identified as a short list vendor.

E. The award decision will be communicated to all RFP respondents once all negotiations are concluded and not before.

F. The University, at its sole discretion, reserves the right to re-advertise; reject all proposals; to reject individual proposals for failure to meet any requirement; to award in part or total; and to waive minor defects and non-compliance. We may seek clarification of the proposal from the vendor at any time, and failure to respond may be cause for rejection. Clarification is not an opportunity to change the proposal. Submission of a proposal confers on the vendor no right to an award or to a subsequent agreement. This process is for the University’s benefit only and is to provide competitive information to assist in our selection process. All decisions on components, evaluation, terms and conditions shall be made solely at the University’s discretion.