REQUEST FOR PROPOSAL # BC-20835-Q
FOR
RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM

ISSUE DATE: JULY 12, 2012

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<tr>
<td>Issue Date</td>
<td>4:00 PM</td>
<td>Thursday, July 12, 2012</td>
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<td>Pre-Proposal Conference</td>
<td>10:00 AM</td>
<td>Thursday, July 26, 2012</td>
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<td>Deadline for Questions</td>
<td>5:00 PM</td>
<td>Friday, August 3, 2012</td>
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<tr>
<td>Technical Proposal Due Date</td>
<td>2:00 PM</td>
<td>Thursday, August 9, 2012</td>
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WARNING: Prospective bidders who have received this document from a source other than the Issuing Office should immediately contact the Issuing Office and provide their name and mailing address in order that amendments to the Request for Proposal or other communications can be sent to them. Any Prospective Proposer who fails to notify the Issuing Office with this information assumes complete responsibility in the event that they do not receive communications from the Issuing Office prior to the closing date.

UNIVERSITY OF MARYLAND BALTIMORE COUNTY
1000 Hilltop Circle
Baltimore, Maryland 21250
www.umbc.edu
RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM
RFP # BC-20835-Q

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RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM
RFP # BC-20835-Q

SECTION I: SUMMARY INFORMATION

A. SUMMARY STATEMENT

The University of Maryland Baltimore County (also called the “University” or “UMBC”) intends to establish a Contract which will include, but not be limited to, providing a Housing Management System which will include a Housing Modules as outlined in the Section III, Scope of Work, as well as, a Judicial Tracking System. Proposer may respond to the Housing Management System, the Judicial Tracking System, or both in the same proposal. The Contractor shall provide all labor, training, materials, and equipment, as well as, any other necessary items to perform the services described herein.

B. ISSUING OFFICE

Sharon Quinn
University of Maryland Baltimore County
Department of Procurement
Administration Building, Room 301,
1000 Hilltop Circle
Baltimore, MD 21250
Voice: (410)-455-2540
FAX: (410) 455-1009
E-mail: squinn@umbc.edu

The sole point of contact in the University for the purpose of this RFP is the issuing office. Any questions with regard to any aspect of this proposal must be directed to Sharon Quinn in writing.

C. QUESTIONS AND INQUIRIES

Questions and inquiries should be directed to the individual referenced with the Issuing Office above. All such questions and inquiries must be received by 5:00 p.m. Thursday, August 3, 2012. Inquiries will receive a written reply. Copies of replies will also be sent to all other proposers, but without identification of the inquirer.

D. DELIVERY OF PROPOSALS

Proposals must be delivered to:
University of Maryland Baltimore County
Department of Procurement
1000 Hilltop Circle, Administration Building, Room 301
Baltimore, MD 21250
Attention: Sharon Quinn
E. **PROPOSAL CLOSING DATE**

In order to be considered, the original and nine (9) copies [for a total of ten (10) sets] of the Technical Proposal must arrive at the issuing office by Thursday, August 9, 2012, no later than 2:00 p.m.

**NOTE:** All UMBC mail goes through the UMBC mailroom, so please leave sufficient time for the mail distribution. A mailed (via US Post Office) proposal is not considered "received" until the document reaches the above room at UMBC. Proposals delivered to the campus central mail facility or to locations other than Room 301 in the UMBC Administration Building will not be considered "received" by UMBC until they arrive at Room 301 in the Administration Building and are clocked in. The University will not waive delay in delivery resulting from the need to transport a proposal from another campus location to Room 301, or error or delay on the part of the carrier.

Proposals received after the established closing date and time cannot be considered. Proposers are advised that a proposal is not considered "received" until it is delivered to the specific location; that is, a proposal must be received in Room 301 by the due date in order to be considered. Proposers must allow sufficient time, therefore, to insure that their proposal is "received" in accordance with this paragraph.

F. **PRE-PROPOSAL CONFERENCE**

There will be a Pre-Proposal Conference held in conjunction with the RFP. The conference will be held on Thursday, July 26, 2012 at 10:00 a.m., in Erickson Hall Conference Room 154, which is located on the 1st Floor of Erickson Hall. Visitor parking is available in the Commons Parking Lot located on Commons Drive. Please refer to the Campus Website for directions and parking: [http://www.umbc.edu/aboutumbc/campusmap/](http://www.umbc.edu/aboutumbc/campusmap/). In conjunction with the RFP, and the Pre-Proposal Meeting, there will be a demonstration of the current “Housing Management and Judicial Tracking System” being used by the University. Please allow about 1 ½ hours for the Pre-Proposal Meeting.

While attendance at the Pre-Proposal Conference is not mandatory, information presented may be very informative; therefore, all interested Proposers are encouraged to attend in order to be able to better prepare acceptable proposals. If your firm plans to send representatives, please call the issuing office by Tuesday, July 24, 2012. We ask that a maximum of two (2) representatives from each company attend this meeting.

Appropriate auxiliary aids and services for qualified individuals with disabilities will be provided upon request. Please call Sharon Quinn (at 410-455-2540) with specific requests at least five (5) business days prior to conference.
G. **DURATION OF PROPOSAL OFFER**

Proposals are to be held valid for 120 days following the closing date for this RFP. This period may be extended by mutual agreement between the vendor and the University.

H. **TERM OF CONTRACT**

The initial contract term shall be for a period of Two (2) years **beginning October 1, 2012 and ending September 30, 2014.** This term is for the purchase and implementation of the System.

The University shall have the option to renew the contract for **Eight (8) additional one-year renewal terms** which will be exercised at the sole discretion of the University. The renewal terms will be for services, upgrades, maintenance and support.

For a Multi-Year Contract or any contract where pricing adjustments may be contemplated during the contract term or subsequent optional extensions terms (unless otherwise stated that price changes will not be permitted), it will be the responsibility of the Contractor to request a price increase, if any, at least ninety (90) days prior to the end of the then current contract term. Any price increase not received by that time, will not be considered and pricing in the renewal term will remain as stated during the just completed contract term. A price increase, if any shall not exceed the consumer price index for “All Urban Consumers” as published by the U.S. Department of Labor Statistics. For purposes of calculating the potential increase, the consumer price index for twelve-month period ending at the previous calendar year. For example, if the contract term ends September 30, 2015, the price index for twelve-month period ending March 2015 will be used. Statistics will be referenced as a cap for negotiable purposes only. Contractor is not to assume that any price increase will be applied to yearly renewals.

I. **EVALUATION OF OFFERS**

A contract award will be made to the responsible proposer(s) whose proposal best meets the needs of the University as determined by the Procurement Officer. All proposals will be evaluated by an University Evaluation Committee. After considering the factors set forth in this RFP, the committee will make recommendations for the award of the contract to the vendor(s) whose proposal is/are determined to be the most advantageous to the University.

J. **PROPOSAL ACCEPTANCE**

The University reserves the right to accept or reject any and all proposals, in whole or in part, received as a result of this RFP, to waive minor irregularities, to negotiate in any manner necessary to best serve the interest of the University. Further, the University reserves the right to make a whole award, multiple awards, a partial award or no award at all. Proposers judged by the procurement officer not to be responsible or proposers whose proposals are classified as not reasonably susceptible of being selected for award shall be so notified. The University reserves the right to increase or decrease the quantities of any materials, equipment, supplies or services.
K. FORMATION OF AGREEMENT/CONTRACT OR ISSUANCE OF PURCHASE ORDER

The Contract to be entered into as a result of this RFP (the “Contract”) shall be by and between the proposer as contractor and the University in the form of a University Contract and shall contain the provisions included herein as Appendix C (Contract), as well as, any additional terms required by UMBC or the State of Maryland. By submitting an offer, the Contractor warrants that they have reviewed Appendix C (Contract) and will execute a contract on that form upon request by UMBC. Proposers must understand and acknowledge that UMBC, as an agency of the State of Maryland, cannot indemnify the Contractor, submit to binding arbitration, or agree to pay the Contractor’s attorney’s fee.

The Contract to be entered into as a result of this RFP (the “Contract”) shall be by and between the Proposer as contractor and the University and shall consist of (1) the terms, conditions and specifications of this RFP and any appendices, amendments, additions or changes thereto; (2) the Standard Contract found in Appendix C, and (3) the Proposer’s response to the RFP and any amendments or changes thereto.

L. ORDER OF PRECEDENCE

The contract between the parties will be embodied in the contract documents, which will consist of those items named in “K” above, listed in their order of precedence. Modifications to the Order of Precedence of those items will not be accepted in order to protect the University against obscure, unrecognized conflicts between the solicitation and a Proposer’s proposal. In the event of a conflict, the terms of the University Contract shall prevail.

M. PROPOSAL AFFIDAVIT AND CERTIFICATIONS

State procurement regulations require that proposals contain certifications regarding non-collusion, debarment, cost and price, etc. The affidavit form, which should be completed by all respondents and returned with their respective responses, is included in Appendix A of the RFP.

N. PIGGYBACK CLAUSE

UMBC is a member of the University System of Maryland (“USM”) and as such, UMBC reserves the right to extend the terms, conditions, and prices of this contract to other institutions of the USM must any of those institutions express an interest in participating in any contract that results from this solicitation for a period of up to one (1) year after UMBC makes its award. Furthermore, on occasion, other State educational institutions (e.g., St. Mary’s College, Morgan State University, Baltimore City Community College) may desire to take advantage of this contract. Each of the piggyback institutions will issue their own purchasing documents. UMBC assumes no obligation on behalf of the piggyback institutions. Proposers must set forth their willingness and ability to extend this contract and the terms, conditions and prices stated herein to these other institutions.

END OF SECTION I
RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM
RFP # BC-20835-Q

SECTION II: GENERAL INFORMATION FOR VENDORS

A. PURPOSE

The overall purpose of this RFP is to provide information to vendors interested in preparing and submitting proposals to meet the requirements for the Residential Life Housing & Judicial Tracking System Contract as described herein. Proposals will be received for the services specified herein or attached hereto under the terms, conditions and general specifications of this proposal.

B. GENERAL INFORMATION FOR VENDORS

1. Proposals must be made in the official name of the firm or individual under whom business is conducted (showing official business address) and must be signed by a duly authorized person.

2. Each proposer must furnish all information required by the proposal request. Erasures or other changes must be initialed by the person signing the proposal. Proposals signed by an agent of the corporation must be accompanied by evidence of their authority.

3. At the Pre-Proposal conference, potential proposers will have an opportunity to: (1) ask and receive answers to all questions regarding the specifications and general conditions, and (2) receive any additional information relating to this contract. A demonstration of the current “Housing Management and Judicial Tracking System” being used by the University will be provided.

4. This Request for Proposals creates no obligation on the part of the University to award the contract or to compensate proposers for proposal preparation expenses.

5. The University reserves the right to award a contract based upon the proposals received without further negotiations. Vendors should therefore not rely on having a chance during negotiations to change their offer.

6. Before the award of a contract, UMBC may require the proposer to submit evidence of any information related to the financial, technical, and other qualifications and abilities of the proposer.

C. ADDENDA TO THE RFP

Any additional information not addressed in this RFP in response to an inquiry received by the Procurement Officer will be answered in writing as an addendum to the RFP. Copies of the addenda will be posted to the eBid Board at www.umbc.edu/adminaffairs/procurement/EBidB.shtml. It is the responsibility of the vendor
to check the website frequently until the opening date for addendums, amendments and changes. Reasonable efforts will be made to avoid the identification of Proposers in any addenda. For purposes of this RFP, there shall be no other communication between UMBC and Proposers other than as described in this paragraph.

**RECEIPT OF THE ADDENDA, AMENDMENT AND/OR CHANGE ISSUED MUST BE ACKNOWLEDGED IN WRITING BY PROSPECTIVE PROPOSERS AND EACH INCLUDED IN THE TECHNICAL PROPOSAL.** An “Acknowledgement of the Receipt” Form (found in Appendix A) for all amendments, addenda, and changes issued shall be required from all vendors submitting a proposal.

**D. CANCELLATION OF THE RFP**

The University may cancel this RFP, in whole or in part, at any time.

**E. ORAL PRESENTATION**

Vendors who submit proposals will be required to make individual presentations to University representatives in order to discuss their proposals. (See Section IV, Item C-2, for further details.).

**F. INCURRED EXPENSES**

The University will not be responsible for any costs incurred by any vendor in preparing and submitting a proposal, delivery of or return of representative samples (if applicable).

**G. ECONOMY OF PREPARATION**

Proposals should be prepared simply and economically, providing a straightforward, concise description of the vendor’s offer to meet the requirements of the RFP.

**H. ACCEPTANCE OF TERMS AND CONDITIONS**

By submitting a proposal in response to this RFP, the firm accepts the terms and conditions set forth in this RFP.

**I. PROCUREMENT REGULATIONS**

This RFP and any resulting contract shall be governed by the USM Procurement Policies and Procedures and the State Finance and Procurement Article of the Annotated Code of Maryland and by State Procurement Regulations, Code of Maryland Regulations Title 21, as applicable.

**J. MULTIPLE PROPOSALS**

Vendors may not submit more than one proposal.
K. **ALTERNATE SOLUTION PROPOSALS**

Vendors may not submit an alternate to the solution given in this RFP.

L. **TELEGRAPHIC/FACSIMILE PROPOSAL MODIFICATIONS**

Vendors may modify their proposals by telegraphic or facsimile communication at any time prior to the due date and time set to receive proposals provided such communication is received by the University prior to such time and, provided further, the University is satisfied that a written confirmation of the modification with the signature of the proposer was mailed prior to the time and date set to receive proposals. The communication should not reveal the proposal price but should provide the addition or subtraction or other modification so that the final prices, percent or terms will not be known to the University until the sealed proposal is opened. If written confirmation is not received within two (2) days from the scheduled proposal opening time, no consideration will be given to the modification communication. No telephone, telegraphic, or facsimile price proposals will be accepted.

M. **CONTRACTOR RESPONSIBILITIES**

The University shall enter into contractual agreement with the selected offering vendor(s) only. The selected vendor(s) shall be responsible for all products and/or services required by this RFP. Subcontractors, if any, shall be identified and a complete description of their role relative to the proposal shall be included. The University’s intent is not to direct the use of any particular vendor, however, the vendor will not contract with any such proposed person or entity to whom the University has a reasonable objection. Notification of such objection will be made by the University within 15 days of contract. The vendor shall be fully responsible for the acts and omissions of its subcontractors and of persons directly or indirectly employed by them.

N. **PUBLIC INFORMATION ACT**

Proposers must specifically identify those portions of their proposals, if any, which they deem to contain confidential, proprietary information or trade secrets and must provide justification why such material should not, upon request, be disclosed by the University under the Public Information Act, Part III, Title 10, State Government Article, Annotated Code of Maryland.

Vendors must clearly indicate each and every section that is deemed to be confidential, proprietary or a trade secret (it IS NOT sufficient to preface your proposal with a proprietary statement). Failure to comply may result in rejection of your proposal.

O. **MINORITY BUSINESS ENTERPRISE NOTICES**

State-certified Minority Business Enterprises (MBE) are strongly encouraged to respond to this solicitation. Minority participation is very important to UMBC and to the State of Maryland. For more information on the State’s MBE program, please see the MDOT website, at http://www.mdot.state.md.us/mb/index.html.
P. ARREARAGES

By submitting a response to this solicitation, a vendor shall be deemed to represent that it is not in arrears in the payment of any obligation due and owing the State of Maryland, including the payment of taxes and employee benefits and that it shall not become so in arrears during the term of the contract if selected for contract award.

Q. TAXES

The UMBC is exempt from Federal Excise Taxes, Maryland Sales and Use Taxes, and the District of Columbia Sales Taxes and Transportation Taxes, except as noted in applicable sections of COMAR. Exemption Certificates shall be provided upon request. Where a Contractor is required to furnish and install material in the construction or improvement of real property in performance of a contract, Contractor shall pay the Maryland Sales tax and the exemption does not apply.

R. RFP RESPONSE MATERIALS

All written materials submitted in response to this RFP become the property of the University and may be appended to any formal documentation, which would further define or expand the contractual relationship between the University and the successful vendor(s).

S. PROPOSAL SECURITY - NOT APPLICABLE

T. DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Unsuccessful proposers may request a debriefing. If the proposer chooses to do so, the request must be submitted in writing to the Procurement Officer within ten days after the proposer knew, or should have known its proposal was unsuccessful. Debriefings shall be limited to discussion of the specific proposer’s proposal only and not include a discussion of a competing proposer’s proposal. Debriefings shall be conducted at the earliest feasible time.

The debriefing may include information on areas in which the unsuccessful proposer’s proposal was deemed weak or insufficient. The debriefing may NOT include discussion or dissemination of the thoughts, notes or ranking from an individual evaluation committee member. A summarization of the procurement officer’s rationale for the selection may be given.
U. MARYLAND PUBLIC ETHICS LAW, TITLE 15

The Maryland Public Ethics Law prohibits, among other things: State employees or officials (and in some cases, former employees) and businesses in which such an individual is employed or holds a financial interest from (i) submitting a bid or proposal, (ii) negotiating a contract, and (iii) entering into a contract with the governmental unit with which the individual is affiliated per the Maryland Code, State Government Article, SS 15-502.

If the bidder/proposer has any questions concerning application of the State Ethics law to the bidder/proposer’s participation in this procurement, it is incumbent upon the bidder/proposer to see advice from the State Ethics Commission; Office of the Executive Director, 9 State Circle, Suite 200, Annapolis, MD 21401, 410-974-2068 or toll free 1-877-669-6085.

The procurement officer may refer any issue raised by a bid or proposal to the State Ethics Commission. The procurement officer may require the bidder/proposer to obtain advice from the State Ethics Commission and may reject a bid or proposal that would result in a violation of the Ethics Law.

The resulting contract is cancelable in the event of a violation of the Maryland Public Ethics Law by the vendor or any State of Maryland employee in connection with this procurement.

V. Health Insurance Portability and Accountability Act of 1996, Pub. L. No. 104-191. ("HIPAA") and Maryland Confidentiality of Medical Records Act (Annotated Code of Maryland, Health – General Article '4-301 et seq. ("the Act").

The University agrees that, for purposes of the Family Educational Rights and Privacy Act of 1974 (20 U.S.C. § 1232g) as amended (“FERPA”), the Contractor will be considered a contractor to whom functions and services have been outsourced by the University. As a result of these function and services, the Contractor might have access to educational records, as defined by FERPA. Contractor agrees that it shall not re-disclose personally identifiable educational records that it receives from the University pursuant to this Agreement, unless such disclosure is authorized to perform the functions and services provided through this agreement or is authorized under FERPA. Contractor expressly warrants and represents that it shall not use the student information or educational records provided by the University for any purpose other than to comply with the terms of this Agreement with the University. Contractor shall indemnify and hold harmless the University from and against any and all claims, suits, proceedings, costs, losses, damages, liabilities, expenses, demands, and judgments, including court costs, attorney's fees, and other reasonable expenses of litigation, which may arise out of, relate to, or be a consequence of, an unauthorized disclosure of educational records. Contractor will, upon discovery, or receipt of notice, of a potential, or actual, material unauthorized disclosure of educational records, immediately report said occurrence to the University. Contractor will work with the University to remediate the unauthorized disclosure (or anticipated unauthorized disclosure) at the expense of Contractor. The terms of the remediation are the sole and exclusive determination of the University.
W. JOINT VENTURE PROPOSERS

If the Proposer is a joint venture firm, the Proposer must provide all identification information for all parties and all requirements for all parties (i.e., licenses, insurance, etc.) as requested. As part of the initial technical proposal submission, the proposer must identify the percentage partnership for each joint venture party, the responsibilities of each joint venture party with respect to the scope of services/work inclusive of the requirements for each entity based on such services as described in this RFP document.

NOTE All joint venture parties will be held responsible for the contract obligations jointly and severally.

X. PAYMENTS BY ELECTRONIC FUNDS TRANSFER

By submitting a response to this solicitation, the Proposer agrees to accept payments by electronic funds transfer unless the State Comptroller’s Office grants an exemption. The selected Offeror shall register using the COT/GAD X-10 Vendor Electronic Funds (“EFT”) Registration Request Form. Any request for exemption shall be submitted to the State Comptroller’s Office for approval at the address specified on the COT/GAD X-10 form and shall include the business identification information as stated on the form and include the reason for the exemption. The COT/GAD X-10 for can be downloaded at: http://compnet.comp.state.md.us/gad/pdf/GADX-10.pdf

END OF SECTION II
SECTION III

TECHNICAL REQUIREMENTS & SPECIFICATIONS

A. BACKGROUND

The University of Maryland Baltimore County (UMBC) is a dynamic public research university integrating teaching, research and service to benefit the citizens of Maryland. As an Honors University, the campus offers academically talented students a strong undergraduate liberal arts foundation that prepares them for graduate and professional study, entry into the workforce, and community service and leadership. UMBC emphasizes science, engineering, information technology, human services and public policy at the graduate level. A member campus of the University System of Maryland (USM), UMBC is located on 500 acres to the southwest of Baltimore, in proximity to the Baltimore Beltway (695) and I-95. Campus infrastructure consists of 47 major buildings and residential complexes in three locations: the Main Campus, the South Campus (bwtech@UMBC Incubator and Accelerator) and the Research Park (bwtech@UMBC Research and Technology Park). Additional information concerning UMBC may be obtained through the UMBC home page, www.umbc.edu.

B. SCOPE OF WORK

The University would like to have a “Housing Management System” which will include the Housing Applications, as well as, a Judicial Tracking System both noted respectively below in the scope of work. However, we reserve the right to select a system with only one (1) component (i.e. the Housing Management System only or the Judicial Tracking System only, or both.) The system must be in place and operating by January 1, 2013. In addition to this system implementation, the University would like to know the process your firm will use to handle the transfer of legacy data.

I. HOUSING MANAGEMENT SYSTEM

A. Housing Applications

Mandatory:

- Must provide a tailorable web-based application module that meets ALL of the following qualifications:
  - Customizable application based on the person’s role such as freshman, current resident, transfer, etc.
  - Customizable application based on different types of housing such as apartments, singles, squats, etc.
  - Customizable to support theme housing such as Living Learning Communities, etc.
  - Able to provide meal plan options based on person’s role
  - Able to provide unlimited customizable questions for roommate and housing preferences, emergency contact information, and any other fields as needed
  - Able to provide multiple waitlist options for students
• Must be able to manage multiple timeframes simultaneously
• Must be able to pull applicant demographic information from PeopleSoft at the time of login
• Must be able to pull/import admission and registrar information from PeopleSoft as needed
• Must be able to create unlimited custom roles for applicants, such as first year student, class standing, transfer, etc.

B. Offers
Mandatory:
• Must provide a method to offer housing based on a specific assignment or general space on-campus
• Must provide active start and end dates for housing offers
• Must provide a method to auto-offer applicant based pre-determined criteria, such as the application date, distance from campus, and/or role
• Must provide a tailorable web-based interface for students to accept or reject housing offers
• Must provide a method for automatically denying or not providing offers to judicially flagged students or other pre-defined criteria

C. Licenses/Contracts
Mandatory:
• Must provide a tailorable web-based interface for students to review and agree to the terms of the online license/contract
• Must provide ability to customize licenses/contracts per timeframe
• Must provide ability to have multiple licenses/contracts types and terms/lengths
• Must enforce a linkage between license submission and associated housing deposit
• Must provide a method of tracking license cancellation data, with a method of providing automatic real time notifications to external stakeholders

D. Assignments
Mandatory:
• Must provide a tailorable web-based interface for applicant to go through a staged process based on their role, license/type, and term that allows them to select specific room type options
• Must provide a method for applicants to request roommates for traditional double rooms, but also in groups for apartments
• Must provide a method for applicants to apply for a single room
• Must provide a method for applicants to squat their current room, if room is eligible to squat
• Must provide assignments that are granular to the “bed” level
● Must allow multiple room types such as singles, doubles, triples, quads, apartments, etc.
● Must provide an auto-assignment functionality
● Must be able to assign by co-ed and single gender spaces
● Must provide a flexible housing lottery/priority system, including the ability to create lottery numbers based on criteria such as credits earned, semesters on campus, etc.
● Must provide a functionality/workflow for performing room changes and room swaps
● Must provide the ability for applicant to view assignment status and history online
● Must provide a method for residents to “check-in” online to verify occupancy and move-in schedule
● Must provide a method of scheduling move-in and move-out dates, with a method of sharing information with external stakeholders
● Must provide a method of displaying past, current and planned assignments

Optional:
● Provide a method of allowing students to identify potential roommates via an online interface

E. **Financial**

**Mandatory:**
● Must provide a function to generate fees based on type of housing
● Must provide a method of automatically prorating fees based on move-in and move-out dates
● Must provide the ability to prorate fees based on a daily and/or weekly rate
● Must provide the ability to adjust refund schedules based on time of cancellation and departure
● Must provide a function to generate fees for assessed damages to specific individuals or groups of individuals
● Must provide a function to reverse individual or group charges, and generate a negative post to PeopleSoft
● Must provide a method to track a housing deposit that can rollover to multiple timeframes
● Must provide a method to track a refund and forfeiture of a housing deposit
● Must provide reporting ability to track the activity of the housing deposit and connect it with a particular student in a specific timeframe (i.e. must provide a report to show all active housing deposits to audit against the general ledger)

**Optional:**
● Provide a function to generate fees for utilities billing
F. **Communication**
   Mandatory:
   - Must provide a built-in communication workflow based on the status of students in the housing selection process and the housing license process
   - Must provide the ability to track customer interactions such as phone, email, meetings, etc. in a customer relationship management type model
   - Must provide a method of scheduling automated deadline reminder notifications

   Optional:
   - Provide a method of generating messages from within the system based on criteria and/or roles

G. **Facilities**
   Mandatory:
   - Must provide a method for adding or removing assets of rooms
   - Must provide a method for tracking damage to assets in rooms
   - Must provide a method for staff (resident assistants) to track room conditions during regular scheduled walk-throughs and generate reports and/or work orders
   - Must provide a method for tracking the condition of inventory in rooms
   - Must provide an online self-service option for students to assess/update room conditions
   - Must provide a method of allowing students to view damage and checkout charges
   - Must provide a method to manage room availability across multiple timeframes due to rooms that may be off-line

   Optional:
   - Provide an online self-service interface for students to enter work orders for rooms
   - Provide a method of tracking workflow and status of work orders
   - Provide a method of communication to and from requestor of work orders
   - Provide a method of tracking and billing utility usage associated with apartments
   - Provide a method of allowing students to appeal damage and checkout charges

H. **Conferences**
   Desirable:
   - Provide ability to block rooms for potential conference groups
   - Provide method to track fees associated with conference group usage
   - Provide method of group data management (ie. check-in/out times, participant counts)
   - Provide an online self-service option to assign conference groups access
   - Provide a method of allowing individual participants to register
I. **Reporting**
   Mandatory:
   - Must allow for export of internal data format to multiple common formats such as .xls, .csv, .txt, and .pdf.
   - Must allow granular permissions for report generation based on access role
   - Must come with standard canned reports such as, Housing Occupancy, Housing Vacancy, Rosters in Alpha Order, Floor Plans, and Emergency Contact Rosters by Building, or the ability to build the mentioned reports
   - Must be able to query data via a web interface

II. **JUDICIAL TRACKING SYSTEM**

A. **Incidents**
   Mandatory:
   - Must provide a system to track and store incidents as unique case files, where an incident is defined as an event where one or more people are involved
   - Must provide an online, customer-facing self-service form that enables submission of information forms/complaints and allows attachments of evidentiary value
   - Must provide a method to upload unlimited (both quantity and size) files to associate with an incident and/or person involved in an incident
   - Must provide the ability to assign cases to specific staff or hearing officers
   - Must include a workflow to track status of conduct process
   - Must provide the ability to customize fields related to incident tracking
   - Must allow for entry, indexing, and tracking of conduct cases, as well as “students of concern,” mental health and medical emergencies, and facilities-related incidents
   - Must allow for the “locking” of certain sensitive cases (e.g. sexual assault) to restrict access in compliance with the Family Educational Rights and Privacy Act (FERPA)

B. **Documentations (Persons Involved)**
   Mandatory:
   - Must provide a method of tracking individuals involved in an incident and their level of involvement
   - Must provide a method of associating the UMBC Campus ID with students and allow for another form of identification for non-students
   - Must provide a method for individuals involved in an incident to submit a narrative of their account of the event
   - Must be able to pull demographic information from PeopleSoft for students as needed, including class schedules, biodem data and contact information
   - Must allow for demographic tracking including, but not limited to race, gender, residence hall, and academic class year
● Must provide activity log/audit trail for all actions related to the incident, including system and manual entries

Optional:
● Provide for a “watch-list” feature that notifies appropriate users whenever actions related to selected students are performed

C. Process Management & Communication
Mandatory:
● Must provide reports that enable conduct officers to track case loads
● Must provide ability to code a student as a “victim” and issue discrete communications to them
● Must provide the capacity to modify/personalize letter templates
● Must provide delivery receipt/confirmation capability for letters and other communications

Optional:
● Provide spellcheck feature for letters

D. Charges & Sanction/Conditions
Mandatory:
● Must provide a method to track individual charges based on outcome of person’s involvement
● Must provide a method to track completion of specific consequences
● Must provide a customizable communication interface to alert sanctioned students of upcoming consequence deadlines

E. Reporting
Mandatory:
● Must allow for export of internal data to multiple common formats such as .xls, .csv, .txt, and .pdf
● Must allow granular permissions for report generation based on access role
● Must come with standard canned reports such as unadjudicated cases, pending documentation, or the ability to build the mentioned reports
● Must be able to query data via a web interface
● Must provide an intuitive customizable reporting system
● Must be able to query incidents within timeframes
● Must provide standard reports to assist with compliance with the Campus Security Act (Clery), Campus Fire Safety Act, missing persons requirements, and National Incident Management System (NIMS)
III. INTEGRATION
Mandatory:
● Must provide integration with PeopleSoft/Oracle Student version 9.0 and greater
● Must provide integration with PeopleSoft/Oracle Finance version 8.9 and greater
● Must either currently work with InCommon Shibboleth for single-sign on (SSO) authentication of end users and administrators or be willing to become a partner in the InCommon Federation within the implementation timeframe
● Must provide integration with university selected electronic payment gateway, currently implemented with HigherOne / CASHNet, with flexibility of changing to another major payment gateway solution in the future

Optional:
● Provide integration or simple export method to work with the Integra 5 Onity keyless door entry system
● Provide campus card integration with CS Gold
● Provide campus card integration or simple export method with Lenel card access systems
● Provide integration with AssetWorks AiM Enterprise Asset Management System
● Provide integration with PropertyBoss Property Management System
● Provide integration with Seattle Technology Group Conference Programmer System

IV. MIGRATION
Desirable:
● Provide a proposal for a strategy to migrate existing data from the legacy CBORD CS Housing 4.00.06 system and/or Oracle back-end database
● Provide a proposal for a strategy to migrate data from a custom in-house judicial incident tracking system stored in the same Oracle database

V. SYSTEM SECURITY
Mandatory:
● Must provide a method to control user access to system functions
● Must be able to define and assign permissions to groups of users
● Must provide an encryption methodology for database records
● Must provide a method for designating FERPA protection for specific records
● Must have a detailed audit trail

Desirable:
● If locally hosted solution, must provide a plan of how patches and updates will be provided
● If locally hosted solution, must provide a detailed system architecture diagram for all server and client interactions

VI. DATA
Mandatory:
● Must provide a method for system administrators to directly query database
● Must provide a method for performing Extract Transform Load (ETL) processes into the campus data warehouse
● Must provide a method of exporting data in a standard and non-proprietary format

Desirable, if externally hosted solution:
● Must provide a quality of uptime, redundancy/fault tolerance, and power outage protection in concordance with the Tier II, Tier III and/or Tier IV Data Center standards, or provide an explanation of business and technical processes that meet that high quality
● Must provide a detailed plan of data continuity in event of a service outage
● Must provide a detailed plan of security precautions against external breaches, intrusions, and rogue processes
● Must provide a detailed plan of backup processes with stated intention of rigorously testing the backup/restore process annually

VII. CLIENT COMPATIBILITY
Mandatory:
● Must be compatible with Windows 7 Enterprise SP1 and any future versions of the Windows operating system, with intent of client operation on Windows 8
● Must be compatible with both 32-bit and 64-bit operating systems
● Must be compatible with Internet Explorer 8 and above, Firefox 12 and above, Chrome 18 and above, and Safari 5 and above

Optional:
● Provide a compatibility interface for mobile browsers
● Provide compatibility for screen reading software and other accessibility technologies

VIII. SERVER COMPATIBILITY
Mandatory, if server is hosted locally:
● Must be compatible with Windows Server 2008 R2 64-bit or any future versions of the Windows Server operating system
● Must be compatible with VMware version 5 and any future distributions of VMware
● If database solution is in a Microsoft SQL Server Database, must be compatible with Microsoft SQL Server 2008 R2 and any future releases of the Microsoft SQL Server database environment
• If database solution is in a Oracle Database, must be compatible with Oracle 11.2 running on Red Hat Enterprise Linux 6 on VMWare 5 or higher

C. **PERIOD FOR ACCEPTANCE**

The selected vendor must agree to an acceptance trial period of performance of NOT LESS THAN thirty (30) consecutive calendar days. This period shall begin on the first fully operational day. The vendor and the University of Maryland Baltimore County shall mutually agree upon, and declare the date that, the contract is considered to be fully operational with respect to the Period of Acceptance.

During the 30 day period, the vendor must perform at a rate and level consistent with the performance specifications contained in the selected vendor's specifications and/or proposal. Failure to satisfy the "acceptance trial period of performance" may result in specified performance contract termination.

In the event that the selected vendor fails to meet all requirements, the University of Maryland Baltimore County shall have the right to declare the vendor's service(s) unacceptable and the vendor in default and to terminate all agreements, written or verbal, without penalty or obligation to the University of Maryland Baltimore County consistent with the provisions of the termination for default clause required in the contract.

Further, should there be any dispute/discrepancy on acceptability of Proposer’s performance, decisions made by the University will prevail.

K. **INSURANCE**

The successful vendor will be required to document proof of insurance for Commercial General Liability, Worker's Compensation, Automobile Insurance and Errors & Omissions Insurance. The University of Maryland Baltimore County and the State of Maryland are to be named as an "additional insured" on all but Worker's Compensation and Errors & Omissions Insurance.

NOTE: INSURANCE MUST BE ON A PRIMARY BASIS. CONTRACTUAL REQUIREMENTS MUST BE CLEARLY INDICATED ON CERTIFICATE OR BY ENDORSEMENTS.

1. The following conditions for insurance must be met by the Vendor:

   a. The Contractor shall not start work under this contract until the Contractor has obtained at its own expense all of the insurance called for hereunder and such insurance has been approved by the procurement officer; nor shall the Contractor allow any subcontractor to start work on any subcontract until all insurance required by the subcontract has been obtained and approved by the contractor and University of Maryland Baltimore County. Approval of insurance required of the contractor and subcontractors for the University will
be granted only after submission to the University of original certificates of insurance signed by an authorized representative of the insurers or, alternately, at the University's request, certified copies of the required insurance policies.

b. The Contractor shall require all subcontractors to maintain during the term of this agreement, Commercial General Liability insurance, Business Automobile Liability insurance, Workers Compensation, and Errors and Omissions Insurance in the same manner, including the additional insured requirements in paragraph e. below, i.e., as specified for the Contractor. The Contractor shall furnish subcontractors' certificates of insurance to the University immediately upon request.

c. All insurance policies required hereunder shall be endorsed to include the following provision; "It is agreed that this policy is not subject to cancellation, non-renewal, material change, or reduction in coverage until forty-five (45) days prior written notice has been given to the University of Maryland Baltimore County".

d. No acceptance and/or approval of any insurance by the University of Maryland Baltimore County shall be construed as relieving or excusing the Contractor, or the surety or bond, if any, from any liability or obligation imposed upon either or both of them by the provision of the Contract Documents.

e. **NAMED ADDITIONAL INSURED** - The University of Maryland Baltimore County and the State of Maryland (including their elected or appointed officials, agents and employees) are to be named as additional insured under all coverage except Workers Compensation and Errors & Omissions Insurance and the certificates of insurance (or the certified policies, if requested), must so indicate through inclusion of appropriate endorsement. **Coverage afforded under this paragraph shall be primary to any other insurance of self-insurance, whether or not such other insurance or self-insurance is stated as primary, excess or contingent, as respects the above additional insured, their elected and appointed officials, agents and employees.**

f. Insurance coverage required in these specifications shall be in force throughout the Contract Term. Should the Contractor fail to provide acceptable evidence of current insurance within ten (10) days of receipt of written notice at any time during the contract term, the University shall have the absolute right to terminate the Contract without any further obligation to the Contractor, and the Contractor shall be liable to the University for the entire additional cost of procuring substitute performance and the cost of performing the incomplete portion of the Contract at time of termination.

g. Contractual and other liability insurance provided under this Contract shall not contain a supervision, inspection or engineering service exclusion that would preclude University of Maryland Baltimore County or participation institutions
from supervising or inspecting the operations of the contractors as the end result.

h. The Contractor shall assume all on-the-job responsibilities as to the control of persons directly employed by it and of agents or subcontractors and anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable.

Contractor shall be as fully responsible to University of Maryland Baltimore County for the acts and omissions of the subcontractors and of persons employed by them as it is for acts and omissions of persons directly employed by Contractor.

i. All required insurance coverage must be acquired from insurers allowed to do business in the State of Maryland and acceptable to University of Maryland Baltimore County. The insurers must have a policyholders' rating of "A-" or better, and a financial size of "Class VII" or better in the latest edition of Best's Insurance Reports.

j. The University of Maryland Baltimore County will consider deductibles or self-insured retention as part of its review of the financial stability of the proposer. Any deductibles or self-insured retention shall be disclosed in the Contractor's proposal and shall be assumed by the Contractor.

2. The Contractor shall purchase the following insurance coverage:

a. **Commercial General Liability Insurance** or its equivalent, for bodily injury, personal injury and property damage, including loss of use. It is preferred that coverage be provided on an "occurrence" basis. If "claims made" forms are submitted, the requirements noted after section "4.1 and 4.2" below must be met. Such Commercial General Liability policy shall include the following extensions:

i. It is preferred that the General Aggregate Limit applies separately to this project:

ii. Premises/Operations:

iii. Actions of Independent Contractors:

iv. Products/completed Operations to be maintained for three (3) years after completion of the contract.

v. Contractual Liability including protection for the Contractor for claims arising out of liability assumed under this contract.
vi. Personal injury liability including coverage for offenses related to employment, and for offenses assumed under this contract (delete any standard employment and contractual exclusions if contained in the personal injury coverage section):

b. **Business Automobile Liability** which will pay for liabilities arising out of accidents involving the ownership, operation, maintenance or use of any owned, hired, or non-owned motor vehicles, uninsured motorists’ insurance and automobile contractual liability.

**NOTE:** INSURANCE MUST BE ON A PRIMARY BASIS.
CONTRACTUAL REQUIREMENTS MUST BE CLEARLY INDICATED ON CERTIFICATE OR BY ENDORSEMENTS

c. **Workers Compensation** - statutory benefits are required by Maryland law or other laws as required by labor union agreements, including standard Other States coverage; Employers Liability coverage.

d. **Errors and Omissions** insurance as required by the laws of the State of Maryland.

3. The coverage listed in Section III, Item K-2, above shall be written for not less than the following limits of liability. **Limits can be furnished by a combination of primary and excess (umbrella) policies.**

   a. Commercial General Liability Insurance including all extensions -
      $2,000,000 each occurrence;
      $2,000,000 personal injury;
      $2,000,000 products liability;
      $3,000,000 general aggregate

   b. Business Automobile Liability -
      $2,000,000 each accident

   c. Workers Compensation insurance - statutory requirements. Employers liability insurance - $1,000,000 each accidental injury; and $1,000,000 each employee, $1,000,000 policy limit for disease.

   d. Errors and Omissions insurance –
      $2,000,000 each occurrence

4. **Tort-Claim Act** - It is agreed that the contractor and its insurers will not raise or use, in the adjustment of claims or in the defense of suits against any participating USM institution, any immunity of the insured from tort liability, (including Maryland Tort
Claim Act), including any limitation of liability, unless requested by any participating institution.

**NOTE:** If insurance required in terms 2.iv and v above has been issued on a "claims made" basis, the Contractor must comply with the following additional conditions. The limits of liability and the extensions to be included as described above remain the same. The Contractor must either:

1. Agree to provide certificates of insurance evidencing the above coverage for period of three (3) years after final payment for the contract. Such certificates shall evidence a retroactive date no later than the beginning of the Contractor's or subcontractor's work under this contract,
   or
2. Purchase an extended [minimum three (3) years] reporting period endorsement for the policy or policies in force during the term of this contract and evidence the purchase of this extended reporting period endorsement by means of a certificate of insurance or a copy of the endorsement itself.

3. The "retroactive date" must be effective prior to the inception of the work under this contract.

4. No "sunset" clauses shall apply.

5. **Additional information:**

   The awarded firm(s) will provide all endorsements from the insurer itself (rather than the agent); and there will be a request to see all coverage declaration pages together with all endorsements (to confirm compliance with the coverage requirements.)

A CERTIFICATION LETTER FROM THE INSURER (RATHER THAN THE AGENT) THAT ALL REQUESTED COVERAGE ARE AVAILABLE AND WILL BE PROVIDED TO THE CONTRACTOR UPON AWARD OF THIS CONTRACT SHOULD BE PROVIDED WITH THE TECHNICAL PROPOSAL.

END OF SECTION III
SECTION IV: EVALUATION AND SELECTION PROCEDURES

A. EVALUATION AND SELECTION COMMITTEE

All vendors’ proposals received by the closing deadline will be evaluated. The Procurement Officer shall establish an Evaluation and Selection Committee to review and rate the proposals. The Committee shall be composed of the Procurement Officer and any other individuals that the Procurement Officer may appoint. The Committee may request additional technical assistance from any source.

B. EVALUATION PROCEDURE

Qualifying Proposals – The Committee shall first review each proposal for compliance with the mandatory requirements of this RFP. Failure to comply with any mandatory requirement will disqualify a vendor’s proposal. The University reserves the right to waive a mandatory requirement when it is in its best interest to do so. The vendor must assume responsibility for addressing all necessary technical and operational issues in meeting the objectives of the RFP.

C. EVALUATION OF PROPOSALS

1. Initial Technical Evaluation: Technical Proposals will be evaluated by the University's Evaluation and Selection Committee before Price Proposals are requested of Proposer. Those Technical Proposals not achieving at least 75% of the technical points available for Initial Phase will not continue or advance further in the procurement process. Proposer’s whose technical proposal achieves the required, minimum technical score of 75% or better of the available technical points will continue in the procurement process and be asked to participate in an Oral Presentation Session at the University.

Technical scoring will be based upon information provided in response to the desirable items in this RFP.

Upon completion of the initial technical evaluation, all proposers will be notified as to the results of the initial technical evaluation of its firm's technical proposal.

2. Oral Presentations:

Those Proposers whose Technical Proposals achieve the required 75% minimum or better technical score will be requested to participate in an Oral Presentation at the University. The due date and time of the Oral Presentation will be set by the University upon completion of the initial evaluation of the Technical Proposals. It is anticipated, however, that Oral Presentations will be conducted on or about Wednesday, September 5, 2012, and Thursday September 6, 2012. The date will be verified by addendum sent to the
applicable proposers at the time it is requested. All proposers are requested to set these dates aside for these sessions on the Account Manager's and his/her immediate Supervisor's calendars so as to avoid any conflicts.

The purposes of the presentation are as follows:

(i) To allow the University to meet the Proposer's Key Personnel;
(ii) To allow the University to review and discuss aspects of selected areas of the Proposer's Technical Proposal (see 3.1 below); and
(iii) To provide an opportunity to clarify the University's scope of services to be provided by the successful vendor.
(iv) To review the Price Proposal Form.

At this time, it is anticipated that each proposer will be requested to have the following personnel attend the oral presentation: the Account Manager, and his/her immediate Supervisor, as well as, any individuals who are needed to assist in the description of any part of the products and services proposed for this RFP.

At the time the Oral Presentations are scheduled, the University will confirm in writing with each Proposer the specifics of these sessions inclusive of the topics, time periods, and requested personnel.

Following the Oral Presentations, the University will conduct the Second Phase Technical Evaluation as described below.

3. **Second Phase Technical Evaluation:**

3.1 Following the Oral Presentations, a second technical evaluation will be conducted in which all categories of the technical proposal will be re-evaluated based on the Oral Presentation Session. Key Personnel and Firm References will be incorporated during this evaluation. The order of importance of the technical criteria will remain the same.

3.2 Proposers must maintain a minimum technical score of 75% of the available technical points in the Second Phase Technical Evaluation in order to advance in the procurement. Upon completion of the Second Phase Technical Evaluation, all Proposers will be notified as to the results this evaluation.
4. **Price Proposal Phase:**

4.1 Only those Proposers who maintain the minimum technical score of 75% or better in the Second Phase Technical Evaluation will be requested via written addendum to submit a Price Proposal.

4.2 The due date and time for Price Proposals to be submitted to the University is anticipated to be **Wednesday, September 19, 2012, at 2:00 p.m.** Price Proposals will be opened privately.

4.3 The University may elect to request Best & Final Price Proposal(s).

D. **MINIMUM TECHNICAL SCORE**

Vendors must **achieve a minimum technical score of 75% of the total points available** for the technical evaluation in order to be considered for further evaluation. Vendors not achieving this minimum technical score will not be considered for the award.

E. **FINANCIAL EVALUATION**

The separate price volume of each qualified proposal will be evaluated following the completion of the technical evaluation. **Price Proposals will not be opened publicly.** Price Proposals will be evaluated based on the best total price to the University.

The University will establish a financial ranking of the proposals from lowest to highest total offers. If a numerical rating is utilized, the lowest evaluated total offer will receive 100% of the points awarded to the financial portion with subsequently higher quotes receiving proportionally lower points.

F. **FINAL RANKING AND SELECTION**

The resulting scores from the technical and price evaluation of proposals will be used as a guide in determining the successful proposer(s). The Evaluation and Selection Committee will choose from among the highest rated proposals which will best serve the interests of the University in accordance with the University System of Maryland Procurement Policies and Procedures. **Technical merit will be given a greater weight than price in the final ranking.**

G. **CRITERIA FOR TECHNICAL EVALUATION**

The criteria that will be used by the committee for the technical evaluation of the proposals for this specific procurement are listed below in **order from most important to least.** Each committee member will score the proposals on each major criterion.
TECHNICAL PROPOSAL

Evaluation Criteria:

1. Statement of Approach - [Refer to Section V, Item C-1]

2. Documentation - [Refer to Section V, Item C-2, C-3, and C-4]
   
   Firm Experience / References
   Company Profile
   Key Personnel / References

3. Financial Statement

END OF SECTION IV
SECTION V:
INFORMATION REQUIRED IN VENDOR PROPOSALS

A. TRANSMITTAL LETTER

A transmittal letter prepared on the vendor’s business stationery should accompany the proposal. The purpose of this letter is to transmit the proposal; therefore, it should be brief. The letter must be signed by an individual who is authorized to bind the firm to all statements, including services and financial offers, contained in the proposal.

B. TWO VOLUME SUBMISSION

The selection procedure for this procurement requires that the technical evaluation of the proposals is to be conducted before the Price Proposals are requested of the Proposers. Consequently, each proposal must be submitted as two separate volumes as indicated below. Failure to do so may constitute disqualification of a vendor’s proposal.

C. VOLUME I – TECHNICAL PROPOSAL

This volume should be prepared in a clear and precise manner. It should address all appropriate points of this RFP except financial information. This volume consists of and must contain the following sections:

1. Statement of Approach to the Contract
2. Completed Forms from Appendix A
3. Letter for Performance Bond
4. Certification to provide insurance as required
5. Bid/Proposal Affidavit

Items # 1 through # 4 listed below are considered “Desirable” (D) for purposes of evaluation.

1. (D) Statement of Approach to the Contract: The proposer is to define who they are, what they do and what they can do for the University with respect to the objectives of this project.

   The proposer must indicate how their firm/team would approach this contract. The purpose of this narrative is not only to outline the tasks to be accomplished in a logical manner, but also to display full comprehension of the services to be provided including, but not limited to, those mandatory items noted in Section III, Item B, “Scope of Work” for this RFP.

   Provide a comprehensive plan indicating “how” the Proposer will provide the required services under this contract. This plan should demonstrate the Proposer's expertise and resources which will be provided to the University.
Your response to this section should include, but not be limited to the following:

A. **HOUSING MANAGEMENT SYSTEM** (refer to the items referenced in Section III, Item B, “Scope of Work”)

1.1 How will your firm handle the Housing Applications?
1.2 How will your firm handle the Offers Process?
1.3 How will your firm handle the Licenses/Contracts?
1.4 How will your firm handle Assignments?
1.5 How will your firm handle Financial processes?
1.6 How will your firm handle Communication?
1.7 How will your firm handle Facilities?
1.8 How will your firm handle Conferences?
1.9 How will your firm handle Reporting?

B. **JUDICIAL TRACKING SYSTEM** (refer to the items referenced in Section III, Item B, “Scope of Work”)

1.1 How will your firm handle Incidents?
1.2 How will your firm handle Documentation?
1.3 How will your firm handle the Process Management & Communication?
1.4 How will your firm handle Charges & Sanction/Conditions?
1.5 How will your firm handle Reporting?

C. **INTEGRATION** (refer to the items referenced in Section III, Item B, “Scope of Work”)

1.1 How will your firm handle integration?
D. MIGRATION (refer to the items referenced in Section III, Item B, “Scope of Work”)

1.1 How will your firm handle the data migration?

1.2 Provide a proposal for a strategy to migrate existing data from the legacy CBORD CS Housing 4.00.06 system and/or Oracle back-end database.

1.3 Provide a proposal for a strategy to migrate data from a custom in-house judicial incident tracking system stored in the same Oracle database.

E. SYSTEM SECURITY (refer to the items referenced in Section III, Item B, “Scope of Work”)

1.1 How will your firm handle the System Security?

1.2 If locally hosted solution, must provide a plan of how patches and updates will be provided.

1.3 If locally hosted solution, must provide a detailed system architecture diagram for all server and client interactions.

F. DATA (refer to the items referenced in Section III, Item B, “Scope of Work”)

1.1 How will your firm handle the data both hosted and not hosted?

1.2 How will your firm handle the data transfer?

1.3 If externally hosted solution:
   1.3.1 Must provide a quality of uptime, redundancy/fault tolerance, and power outage protection in concordance with the Tier II, Tier III and/or Tier IV Data Center standards, or provide an explanation of business and technical processes that meet that high quality

   1.3.2 Must provide a detailed plan of data continuity in event of a service outage

   1.3.3 Must provide a detailed plan of security precautions against external breaches, intrusions, and rogue processes

   1.3.4 Must provide a detailed plan of backup processes with stated intention of rigorously testing the backup/restore process annually
G. CLIENT COMPATIBILITY (refer to the items referenced in Section III, Item B, “Scope of Work”)

1.1 How will your firm handle compatibility?

H. SERVER COMPATIBILITY (refer to the items referenced in Section III, Item B, “Scope of Work”)

1.1 How will your firm handle the server hosting?

I. TIMELINE: provide a timeline for your firm to install and implement this service to meet the January 1st deadline.

2. (D) Firm Experience:

2.1 Complete an "Experience Form" (found in Appendix A) for three (3) contracts where these services have been performed within the last three (3) years; and provide the dollar value of each contract. **All of these contracts should be in a higher academic environment.** All are to be **similar in size and scope** to The University of Maryland Baltimore County.

List the following on each:

- Name and address of contract location;
- Number of years the contract has been in place;
- Owner's name, address, telephone and contact person;
- Brief description of the scope of the contract and the services performed by your firm;
- Name(s) of the responsible Account Manager within your organization who manages the contract.

2.2 References: Provide at least three (3) references (preferably those from the experience list above in 2.1) of contract locations where these services have been performed within the last three (3) years. Provide contact name, address, telephone number and account name and location for each reference. It is imperative that accurate contact names and phone numbers be given for the contracts listed. All references should include a contact person who can comment on the firm's ability to handle a contract of this type.

All references for the Firms will be checked during the **Second Technical Evaluation Phase.** Only the firms who achieve the minimum required score or better will move forward to the Second
Technical Evaluation Phase. However, all firms responding must provide this information within their Technical Proposals due on Thursday, August 9, 2012 by 2:00 PM. The University reserves the right to verify all information given if it so chooses, as well as, to check any other sources available including itself even if not provided as a reference by the Proposer. Such references will be held in the strictest confidence.

3. **(D) Company Profile/Background Information:** Complete the “Company Profile Form” found in Appendix A which includes a description of your company and its history, as well as, the management and ownership structure.

4. **(D) Key Personnel:** The Account Manager is defined as the University's primary point of contact on a day-to-day basis and the person who will manage the contract for the vendor. The Account Manager for this contract must be a direct employee of the proposing firm and must speak English.

   4.1 Complete a "Key Personnel Form" (found in Appendix A) on the person proposed for the Account Manager for this contract inclusive of their qualifications, number of years with the firm, and prior experience inclusive of the role the person played on other contracts.

   4.2 Provide three (3) references (preferably those provided in 4.1. above) on the Account Manager. Such references must be able to comment on the person's performance in the role assigned in this proposal. All references will be held in the strictest confidence.

   All references for the Account Manager and the Firm will be checked during the Second Technical Evaluation Phase. Only the firms who achieve the minimum required score will move forward to the Second Technical Evaluation Phase. However, all firms responding must supply this information within their Technical Proposals submitted on Thursday, August 9, 2012 by 2:00 PM. The University reserves the right to verify all information given if it so chooses, as well as, to check any other sources available including itself even if not provided as a reference by the Proposer. Such references will be held in the strictest confidence.

   4.3 List the name(s) of the Account Manager’s Back-up for extended absences.

5. **(D) Financial Stability of the Company:** Submit a statement indicating the financial stability and ability to finance and manage this account. Such a statement may consist of one of the following: a current Financial Report (preferred) or a Dun and Bradstreet Report with D&B rating noted; or, a
narrative of the past five years' business profile; etc. Statements shall be current. All information will be kept confidential.

6. **Performance Bond**: The successful Contractor shall furnish a Performance Bond in the amount of one hundred (100%) of the total estimated first year Contract price. At the effective date of any continuation of the initial term and/or renewal term, the contractor shall furnish a Performance Bond applicable to the next 12-month period of the term, increased or decreased by the percentage that the estimated first year cost would be adjusted over the proceeding year.

   All firms responding to this solicitation with A Price Proposal MUST have a letter from their Bonding Company stating that they have the capability to provide the Performance Bond as required for this procurement; and will do so within seven days of notification of award.

7. **Completed Bid/Proposal Affidavit with Addendum** (found in Appendix A).

8. **Acknowledgement of Receipt of Addenda Form**: (found in Appendix A) In the event addenda to the solicitation documents are issued prior to the due date and time for proposals, this form is to be completed and enclosed with the proposal.

Any other information that may be relevant but does not fall in the above format should be provided as an appendix to this volume. Minor irregularities in the proposals, which are deemed immaterial or inconsequential in nature, may be waived whenever it is determined to be in the best interest of the University.

If company literature or other publications are included and intended to respond to an RFP requirement, the response in this volume should include reference to the document name and page.

Technical volumes containing no such citations will be considered complete and without need to refer to other documents, i.e., the Evaluation and Selection Committee will not be required to refer to any additional documents for the vendor responses to RFP requirements during the evaluation process.

B. **VOLUME II – PRICE PROPOSAL**

Price Proposals are NOT being requested at this time. An addendum will be issued to those firms who achieved the 75% minimum technical score or better. This volume must be submitted in a sealed envelope separate and apart from the technical volume. The envelope shall have the Proposer's name, the contract name and the RFP number prominently displayed, together with the words "PRICE PROPOSAL". It must contain the following:
1. **(D) Price Proposal Form:** Complete the Price Proposal Form in Appendix B. The Price Proposal shall be filled out **completely** in ink or typed. Any erasures and/or alterations to the Proposer’s pricing shall be initialed in ink by the signer. **Please note, however, that no changes, alterations or additions to the Price Proposal Form are permitted.**

2. **Price Proposal Due Date/Time:** The due date and time for the Price Proposal is anticipated to be **Wednesday, September 19, 2012 at 2:00 p.m.** Price Proposals will be **opened privately.**

3. Price Proposals will be evaluated based on the total price proposal of each module: Housing Management System and the Judicial Tracking System, independently, as well as, the modules added together.

**D. SUBMISSION**

Vendors must submit the required number of copies of his/her proposal by the closing time and date specified in Section I, Item E of the RFP.

**END OF SECTION V**
VI. APPENDICES

APPENDIX A – TECHNICAL PROPOSAL FORMS
APPENDIX B – PRICE PROPOSAL FORM
APPENDIX C – CONTRACT FORMS
APPENDIX D – UMBC WEBSITE / CAMPUS MAP
TECHNICAL FORMS

- Firm Experience/Reference Form
- Company Profile Form
- Key Personnel/Reference Form
- Acknowledgement of Receipt of Addenda Form
- Bid Proposal Affidavit
EXPERIENCE FORM

PROPOSER'S NAME: _________________________________

CLIENT'S NAME: _________________________________

CLIENT'S ADDRESS: ________________________________

CLIENT'S TELEPHONE NUMBER: _______________________

TYPE OF CONTRACT: (Check all that apply)

___ Academic / Higher Education (all 3 must be in a higher academic environment)

___ Other: ____________________________________________

Total Number of Students: _____________

Number of Resident Students: _____________

CONTRACT DOLLAR SIZE: ______________________________

CONTRACT TERM: FROM: ______________________________ TO: ______________________________

NAME OF PROPOSING FIRM'S ACCOUNT MANAGER WHO MANAGES THIS CONTRACT: _________________________

TYPE OF SERVICES BEING PROVIDED: (CHECK ALL THAT APPLY)

___ Housing Applications
___ Web-based interface service for students
___ Customized license/contracts per timeframe
___ Ability to request roommates
___ On-line check-in for residents
___ Scheduling move-in and move-out dates
___ Generate fees based on type of housing
___ Adjust refund schedules
___ Track housing deposit / refunds
___ Potential for Conference Groups
___ Facilities Module
___ Reporting Capabilities

Other: ____________________________ Other: ____________________________ Other: ____________________________

PROVIDE A BRIEF, BUT DETAILED, DESCRIPTION OF SIMILARITIES OF YOUR CONTRACT SCOPE TO REQUIREMENTS FOR THIS CONTRACT SCOPE OF SERVICES:

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

END OF FORM
COMPANY NAME: ____________________________________________________________

DATE OF INCORPORATION: ____________ STATE OF INCORPORATION: _______

# OF YEARS IN BUSINESS: ____________ NUMBER OF EMPLOYEES: ________

OTHER OR FORMER NAMES UNDER WHICH YOUR ORGANIZATION HAS OPERATED:
__________________________________________________________________________

NAMES OF PRINCIPAL(S) AND TITLE(S):
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

HEADQUARTERS LOCATION:
__________________________________________________________________________

LOCATION OF OFFICE THAT WILL PROVIDE SERVICES TO UMBC AND NUMBER OF EMPLOYEES:
__________________________________________________________________________

TYPE(S) OF WORK PERFORMED AND SERVICES PROVIDED:
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
APPENDIX A

RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM
RFP-BC-20835-Q
COMPANY PROFILE FORM
Page 2 of 2

COMPANY NAME: ____________________________________________________________

ANNUAL SALES:


BRIEF HISTORY OF THE COMPANY (if preferred, an attachment to this form can be provided):

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

OTHER COMMENTS/ADDITIONAL INFORMATION:

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

END OF COMPANY PROFILE FORM
APPENDIX A
RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM
KEY PERSONNEL FORM – RFP # BC-20835-Q

1. **PERSON'S NAME:** ________________________________________________

2. **POSITION TO BE ASSIGNED:** __ Account Manager
   __ Back-up to Account Manager

3. **EDUCATIONAL BACKGROUND:**

<table>
<thead>
<tr>
<th>Institution</th>
<th>Degree/Diploma/Certificates</th>
<th>Major (if any)</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

4. **EMPLOYMENT HISTORY***: (*NOTE: If a person has more than three (3) employers in his/her employment history, please provide complete employment history via supplemental page(s) attached to this form.)

4.1 **CURRENT EMPLOYER'S NAME:** ____________________________________

DATES OF EMPLOYMENT: ____________________________

POSITION HELD DURATION BY DATE

<table>
<thead>
<tr>
<th>Position Held</th>
<th>Duration by Date</th>
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</table>

4.2 **PRIOR EMPLOYER'S NAME:** ____________________________________

DATES OF EMPLOYMENT: ____________________________

POSITION HELD DURATION BY DATE

<table>
<thead>
<tr>
<th>Position Held</th>
<th>Duration by Date</th>
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</tbody>
</table>

Page 1 of 3
4.3 PRIOR EMPLOYER'S NAME: _____________________________________

DATES OF EMPLOYMENT: _______________________________________

POSITION HELD DURATION BY DATE

_________________________________ _______________________

_________________________________ _______________________

5. ROLE: Describe the role of this person in this contract, including services to be provided directly and services to be supervised as provided by others.

_________________________________________________________________

_________________________________________________________________

6. SIMILAR PROJECT EXPERIENCE/REFERENCES: (Note: It is preferable that these references be from the contract experience provided as an attachment to this "Key Personnel Form"; if this is the case, you need only indicate "see attached" under the Description of Contract item.)

6.1 CONTACT PERSON: _________________________ TELEPHONE #: ______

COMPANY NAME: _______________________________________________

PROJECT/CONTRACT NAME DOLLAR VALUE HOW MANY YEARS?

___________________________ $___________ _________

DESCRIPTION OF CONTRACT SERVICED: __________________________

_________________________________________________________________

6.2 CONTACT PERSON: _________________________ TELEPHONE #: ______

COMPANY NAME: _______________________________________________

PROJECT/CONTRACT NAME DOLLAR VALUE HOW MANY YEARS?

___________________________ $___________ _________
DESCRIPTION OF ACCOUNT SERVICED: ________________________________________________

___________________________________________

6.3 CONTACT PERSON: _________________________ TELEPHONE #: _______
COMPANY NAME: ________________________________________________
PROJECT/CONTRACT NAME   DOLLAR VALUE   HOW MANY YEARS?
___________________________ $______________ __________
DESCRIPTION OF ACCOUNT SERVICED: ______________________________

____________________________________________________________

____________________________________________________________

____________________________________________________________

7. ACHIEVEMENTS/OTHER NOTATIONS (NOT REQUIRED):
____________________________________________________________

____________________________________________________________

____________________________________________________________

NOTE: If a Proposer finds the space provided to be insufficient, he/she can attach additional pages to this form as he/she finds appropriate and just indicate on the this form to see “attached pages”.

END OF FORM
RFP NO.: BC-20835-Q

TECHNICAL PROPOSALS

DUE DATE: THURSDAY, AUGUST 9, 2012 AT 2:00 P.M.

RFP FOR: RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM

NAME OF PROPOSER:______________________________________________

ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The undersigned, hereby acknowledges the receipt of the following addenda:

Addendum No. ____ dated _________
Addendum No. ____ dated _________
Addendum No. ____ dated _________
Addendum No. ____ dated _________
Addendum No. ____ dated _________
Addendum No. ____ dated _________

As stated in the solicitation documents, this form is included in our Technical Proposal.

________________________________________
Signature

________________________________________
Printed Name

________________________________________
Title

________________________________________
Date

END OF FORM
BID/PROPOSAL AFFIDAVIT

A. AUTHORIZED REPRESENTATIVE

I HEREBY AFFIRM THAT: I am the ______________________ (title) and the duly authorized representative of ____________________________ (business) and that I possess the legal authority to make this Affidavit on behalf of myself and the Business for which I am acting.

B. AFFIRMATION REGARDING BRIBERY CONDITIONS

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the above business (as is defined in Section 16-101 (b) of the State Finance and Procurement Article of the Annotated Code of Maryland), or any of its officers, directors, partners, controlling stockholders, or any of its employees directly involved in the business's contracting activities including obtaining or performing contracts with public bodies (as is defined in Section 16-101 (f) of the State Finance and Procurement Article of the Annotated Code of Maryland), has been convicted of, or has had probation before judgment imposed pursuant to Article 27, Section 641 of the Annotated Code of Maryland, or has pleaded nolo contendere to a charge of bribery, attempted bribery, or conspiracy to bribe in violation of Maryland law, or of the law of any other state or federal law, except as follows (indicate reasons why the affirmation cannot be given and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of person(s) involved, and their current positions and responsibilities with the business) (use attachments as necessary):

C. AFFIRMATION REGARDING OTHER CONVICTIONS

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the above business, or any of its officers, partners, controlling stockholders, or any of its employees directly involved in the business's contracting activities including obtaining or performing contracts with public bodies, has:

(1) Been convicted under state or federal statute of:
   (a) a criminal offense incident to obtaining, attempting to obtain, or performing a public or private contract; or
   (b) fraud, embezzlement, theft, forgery, falsification or destruction of records, or receiving stolen property;
(2) Been convicted of any criminal violation of a state or federal antitrust statute;
(3) Been convicted under the provisions of Title 18 of the United States Code for violation of the Racketeer Influenced and Corrupt Organization Act, 18 U.S.C. 1961 et seq., or the Mail Fraud Act, 18 U.S.C. 1341 et seq., for acts in connection with the submission of bids or proposals for a public or private contract;
(4) Been convicted of a violation of the State Minority Business Enterprise Law, SS 14-308 of the State Finance and Procurement Article of the Annotated Code of Maryland;
(5) Been convicted of a violation of the SS11-205.1 of the State Finance and Procurement Article of the Annotated Code of Maryland;
(6) Been convicted of conspiracy to commit any act or omission that would constitute grounds for conviction or liability under any law or statute described in subsection (1) - (5) above;
(7) Been found civilly liable under a state or federal antitrust statute for acts or omissions in connection with the submission of bids or proposals for a public or private contract; or
(8) Admitted in writing or under oath, during the course of an official investigation or other proceedings, acts or omissions that would constitute grounds for conviction or liability under any law or statute described in SSB and C (1) – (7) above, except as follows (indicate reasons why the affirmations cannot be given, and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of the person(s) involved and their current positions and responsibilities with the business) (use attachments as necessary):

D. AFFIRMATION REGARDING DEBARMENT

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the above business, or any of its officers, directors, partners, controlling stockholders, or any of its employees directly involved in the business's contracting activities, including obtaining or performing contracts with public bodies, has ever been suspended or debarred (including being issued a limited denial of participation) by any public entity, except as follows (list each debarment or suspension providing the dates of the suspension or debarment, the name of the public entity and the status of the proceedings, the name(s) of the person(s) involved and their current positions and responsibilities with the business, the grounds of the debarment or suspension, and the details of each person's involvement in any activity that formed the grounds of the debarment or suspension) (use attachments as necessary):
E. AFFIRMATION REGARDING DEBARMENT OF RELATED ENTITIES

I FURTHER AFFIRM THAT:
(1) The business was not established and it does not operate in a manner designed to evade the application of or defeat the purpose of debarment pursuant to Section 16-101, et seq., of the State Finance and Procurement Article of the Annotated Codes of Maryland; and
(2) The business is not a successor, assignee, subsidiary, or affiliate of a suspended or debarred business, except as follows (you must indicate the reasons why the affirmations cannot be given without qualification) (use attachments as necessary):

F. SUB-CONTRACT AFFIRMATION

I FURTHER AFFIRM THAT:
Neither I, nor to the best of my knowledge, information, and belief, the above business, has knowingly entered into a Contract with a public body under which a person debarred or suspended under Title 16 of the State Finance and Procurement Article of the Annotated Code of Maryland will provide, directly or indirectly, supplies, services, architectural services, construction related services, leases of real property, or construction.

G. AFFIRMATION REGARDING COLLUSION

I FURTHER AFFIRM THAT:
Neither I, nor to the best of my knowledge, information, and belief, the above business has:
(1) Agreed, conspired, connived, or colluded to produce a deceptive show of competition in the compilation of the accompanying bid or offer that is being submitted;
(2) In any manner, directly or indirectly, entered into any agreement of any kind to fix the bid price or price proposal of the bidder or proposer or of any competitor, or otherwise taken any action in restraint of free competitive bidding in connection with the contract for which the accompanying bid or offer is submitted.

H. FINANCIAL DISCLOSURE AFFIRMATION

I FURTHER AFFIRM THAT:
I am aware of, and the above business will comply with, the provisions of Section 13-221 of the State Finance and Procurement Article of the Annotated Code of Maryland, which require that every business that enters into contracts, leases, or other agreements with the State of Maryland or its agencies during a calendar year under which the business is to receive in the aggregate $100,000 or more shall, within 30 days of the time when the aggregate value of the contracts, leases, or other agreements reaches $100,000, file with the Secretary of State of Maryland certain specified information to include disclosure of beneficial ownership of the business.

I. POLITICAL CONTRIBUTION DISCLOSURE AFFIRMATION

I FURTHER AFFIRM THAT:
I am aware of, and the above business will comply with, Election Law Article, SS 14-101 through 14-108, Annotated Code of Maryland, which requires that every person that enters into contracts, leases, or other agreements with the State of Maryland, including its agencies or a political subdivision of the State, during a calendar year in which the person receives in the aggregate $100,000 or more shall, file with the State Board of Elections a statement disclosing contributions in excess of $500 made during the reporting period to a candidate for elective office in any primary or general election.

J. DRUG AND ALCOHOL FREE WORKPLACE

(Applicable to all contracts unless the contract is for a law enforcement agency and the agency head or the agency head's designee has determined that application of COMAR 21.11.08 and this certification would be inappropriate in connection with the law enforcement agency's undercover operations.)
I CERTIFY THAT:

(1) Terms defined in COMAR 21.11.08 shall have the same meaning when used in this certification.

(2) By submission of its bid or offer, the business, if other than an individual, certifies and agrees that, with respect to its employees to be employed under a contract resulting from this solicitation, the business shall:

(a) Maintain a workplace free of drug and alcohol abuse during the term of the contract;

(b) Publish a statement notifying its employees that the unlawful manufacture, distribution, dispensing, possession, or use of drugs, and the abuse of drugs or alcohol is prohibited in the business' workplace and specifying the actions that will be taken against employees for violation of these prohibitions;

(c) Prohibit its employees from working under the influence of drugs or alcohol;

(d) Not hire or assign to work on the contract anyone whom the business knows, or in the exercise of due diligence should know, currently abuses drugs or alcohol and is not actively engaged in a bona fide drug or alcohol abuse assistance or rehabilitation program;

(e) Promptly inform the appropriate law enforcement agency of every drug-related crime that occurs in its workplace if the business has observed the violation or otherwise has reliable information that a violation has occurred;

(f) Establish drug and alcohol abuse awareness program to inform its employees about:

(i) The dangers of drug and alcohol abuse in the workplace;

(ii) The business' policy of maintaining a drug and alcohol free workplace;

(iii) Any available drug and alcohol counseling, rehabilitation, and employee assistance programs; and

(iv) The penalties that may be imposed upon employees who abuse drugs and alcohol in the workplace;

(g) Provide all employees engaged in the performance of the contract with a copy of the statement required by J (2) above;

(h) Notify its employees in the statement required by J (2) (b), above, that as a condition of continued employment on the contract, the employee shall:

(i) Abide by the terms of the statement; and

(ii) Notify the employer of any criminal drug or alcohol abuse conviction for an offense occurring in the workplace not later than five (5) days after a conviction;

(i) Notify the procurement officer within ten (10) days after receiving notice under J (2) (h) (ii), above, or otherwise receiving actual notice of a conviction;

(j) Within 30 days after receiving notice under J (2) (h) (ii), above, or otherwise receiving actual notice of conviction, impose either of the following sanctions or remedial measures on an employee who is convicted of a drug or alcohol abuse offense occurring in the workplace:

(i) Take appropriate personnel action against an employee, up to and including termination; or

(ii) Require an employee to satisfactorily participate in a bona fide drug or alcohol abuse assistance or rehabilitation program; and

(k) Make a good faith effort to maintain a drug and alcohol free workplace through implementation of J (2) (a) - (j), above.

(3) If the business is an individual, the individual shall certify and agree as set forth in J (4), below, that the individual shall not engage in the unlawful manufacture, distribution, dispensing, possession, or use of drugs or the abuse of drugs or alcohol in the performance of the contract.

(4) I acknowledge and agree that:

(a) The award of the contract is conditional upon compliance with COMAR 21.11.08 and this certification;

(b) The violation of the provisions of COMAR 21.11.08 or this certification shall be cause to suspend payments under, or terminate the contract for default under COMAR 21.07.11 or 21.07.03.15, as applicable; and

(c) The violation of the provisions of COMAR 21.11.08 or this certification in connection with contract may, in the exercise of the discretion of the Board of Public Works, result in suspension and debarment of the business under COMAR 21.08.03.

K. CERTIFICATION OF CORPORATION REGISTRATION AND TAX PAYMENT

I FURTHER AFFIRM THAT:

(1) Except as validly contested, the business had paid, or has arranged for payment of, all taxes due the State of Maryland and has filed all required returns and reports with the Comptroller of the Treasury, the State Department of Assessments and Taxation, and the Employment Security Administration, as applicable, and will have paid all withholding taxes due the State of Maryland prior to final payment under any contract relating to this bid/proposal affidavit.

(2) The business named above is a ________ sole proprietorship, ________ partnership, or ________ corporation formed under the laws of the State of __________. [For entities not formed under the laws of Maryland] I further affirm that the business named above is registered in accordance with the Corporations and Associations Article, Annotated Code of Maryland, and that it is in good standing and has filed all of its annual reports, together with filing fees, with the Maryland State Department of Assessments and Taxation, and that the name and address of its current resident agent is filed with the State Department of Assessments and Taxation as:

Name: ______________________________________________________

Address: ____________________________________________________

L. CONTINGENT FEES
I FURTHER AFFIRM THAT:
The business has not employed or retained any person, partnership, corporation, or other entity, other than a bona fide employee, bona fide agent, bona fide salesperson, or commercial selling agency working for the business, to solicit or secure the Contract, and that the business has not paid or agreed to pay any person, partnership, corporation, or other entity, other than a bona fide employee, bona fide agent, bona fide salesperson, or commercial selling agency, any fee or any other consideration contingent on the making of the Contract.

M. ACKNOWLEDGMENT

I ACKNOWLEDGE THAT this Affidavit is to be furnished to the Procurement Officer and may be distributed to units of: (1) the State of Maryland; (2) counties or other subdivisions of the State of Maryland; (3) other states; and (4) the federal government. I further acknowledge that this Affidavit is subject to applicable laws of the United States and the State of Maryland, both criminal and civil, and that nothing in this Affidavit or any contract resulting from the submission of the accompanying bid or proposal shall be construed to supersede, amend, modify or waive, on behalf of the State of Maryland, or any unit of the State of Maryland having jurisdiction, the exercise of any statutory right or remedy conferred by the Constitution, and the laws of Maryland with respect to any misrepresentation made or any violation of the obligations, terms and covenants undertaken by the above business with respect to (1) this Affidavit, (2) the contract, and (3) other Affidavits comprising part of the contract.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

Date: ________________________________
EIN or SS#: ________________________________
By: ________________________________________
Solicitation#: ______________________________

(Authorized Representative and Affiant)

12.0021 (Rev. 11/05)

END OF FORM

END OF APPENDIX-A
APPENDIX B

PRICE PROPOSAL FORM

Price Proposal Form
RFP NO.: BC-20835-Q
PRICE PROPOSAL DUE: WEDNESDAY, SEPTEMBER 19, 2012 at 2:00 P.M.
PROPOSAL FOR: RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM

PROPOSER: ____________________________________________________

Federal Identification Number/Social Security Number: _______________

PRICE PROPOSAL

DATE_______________________

Ms. Sharon Quinn
Department of Procurement Services
University of Maryland Baltimore County
Administration Building, Room 301
1000 Hilltop Circle
Baltimore, MD  21250

Dear Ms. Quinn:

The undersigned hereby submits the Price Proposal as set forth in RFP # BC-20835-Q dated 07/12/12 and the following subsequent addenda:

Addendum ____ dated _____
Addendum ____ dated _____
Addendum ____ dated _____

Having received clarification on all matters upon which any doubt arose, the undersigned proposes to complete the work as described in the RFP and subsequent Addenda as noted above.

By signing and submitting this response, undersigned hereby agrees to all the terms and conditions of the RFP including any issued addenda.

The pricing provided in the following Sections is to include all of the Contractor’s costs for materials, supplies, equipment and licenses, to perform the services (i.e. overhead, profit, etc.). No additional compensation will be applicable for these services, unless additional services are requested by the University which are outside of the scope of services specified within this RFP document.

The Contractor’s Proposal can be accepted in whole or part. While it is the intent of the University to award most or all of the requested work as one contract, the University reserves the right to make an award which best serves the interest of the University.
RFP NO.: BC-20835-Q
PRICE PROPOSAL DUE: WEDNESDAY, SEPTEMBER 19, 2012 at 2:00 P.M.
PROPOSAL FOR: RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM

PROPOSER: ____________________________________________________

1. **Firm Fixed Price for Housing Management System**: Enter the initial start-up Dollar Amount in the Chart below. This dollar amount is for all the materials, supplies, equipment and licenses to provide the services required under this contract; and will be paid after the services have been rendered and are considered satisfactory to the University.

1.1 **Price for Hosting locally at UMBC**:

<table>
<thead>
<tr>
<th>Contract Year</th>
<th>Product</th>
<th>License Fee</th>
<th>Service Fee</th>
<th>Implementation</th>
<th>Interface</th>
<th>Module</th>
<th>Training</th>
<th>TOTAL</th>
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</thead>
<tbody>
<tr>
<td>Year-1</td>
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</table>

1.2 **Price for Hosting externally**:

<table>
<thead>
<tr>
<th>Contract Year</th>
<th>Product</th>
<th>License Fee</th>
<th>Service Fee</th>
<th>Implementation</th>
<th>Interface</th>
<th>Module</th>
<th>Training</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year-1</td>
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</table>
RFP NO.: BC-20835-Q  
PRICE PROPOSAL DUE: WEDNESDAY, SEPTEMBER 19, 2012 at 2:00 P.M.  
PROPOSAL FOR: RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM

1.3 Price for Hosting locally at UMBC:

<table>
<thead>
<tr>
<th>Renewal Year</th>
<th>License Fee</th>
<th>Service Fee</th>
<th>Interface Fee</th>
<th>Training</th>
<th>TOTAL</th>
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<td>Year-10</td>
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1.4 Price for Hosting externally:

<table>
<thead>
<tr>
<th>Renewal Year</th>
<th>License Fee</th>
<th>Service Fee</th>
<th>Interface Fee</th>
<th>Training</th>
<th>TOTAL</th>
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<td>Year-10</td>
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1.5 Additional Fees not noted above:

Other: ________________________________

Other: ________________________________

Other: ________________________________
RFP NO.: BC-20835-Q
PRICE PROPOSAL DUE: WEDNESDAY, SEPTEMBER 19, 2012 at 2:00 P.M.
PROPOSAL FOR: RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM

2. **Firm Fixed Price for Judicial Tracking System**: Enter the initial start-up Dollar Amount in the Chart below. This dollar amount is for the all the materials, supplies, equipment and licenses to provide the services required under this contract; and will be paid after the services have been rendered and are considered satisfactory to the University.

2.1 **Price for Hosting locally at UMBC**:

<table>
<thead>
<tr>
<th>Contract Year</th>
<th>Product</th>
<th>License Fee</th>
<th>Service Fee</th>
<th>Training</th>
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<td>Year-1</td>
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2.2 **Price for Hosting externally**:

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<tr>
<th>Contract Year</th>
<th>Product</th>
<th>License Fee</th>
<th>Service Fee</th>
<th>Training</th>
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RFP NO.: BC-20835-Q  
PRICE PROPOSAL DUE: WEDNESDAY, SEPTEMBER 19, 2012 at 2:00 P.M.  
PROPOSAL FOR: RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM

2.3 Price for Hosting locally at UMBC:

**OPTIONAL RENEWAL YEARS**

<table>
<thead>
<tr>
<th>Renewal Year</th>
<th>License Fee</th>
<th>Service Fee</th>
<th>Interface Fee</th>
<th>Training</th>
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2.4 Price for Hosting externally:

**OPTIONAL RENEWAL YEARS**

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<tr>
<th>Renewal Year</th>
<th>License Fee</th>
<th>Service Fee</th>
<th>Interface Fee</th>
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1.5 Additional Fees not noted above:

Other: _______________________________________

Other: _______________________________________

Other: _______________________________________

17
RFP NO.: BC-20835-Q
PRICE PROPOSAL DUE: WEDNESDAY, SEPTEMBER 19, 2012 at 2:00 P.M.
PROPOSAL FOR: RESIDENTIAL LIFE HOUSING & JUDICIAL TRACKING SYSTEM

3. Should the University decide to select both the Housing Management System and the Judicial Tracking System, how would this affect the above pricing? Are there any discounts offered?

We understand that by submitting a proposal we are agreeing to all of the terms and conditions included in the RFP documents.

We understand that the evaluation and subsequent final ranking of proposals will be in accordance with the RFP documents.

We understand that the University reserves the right to award a contract (or contracts) for all items, or any parts thereof, as set forth in detail under the information furnished in the RFP document.

We further confirm that the Account Manager named within our Technical Proposal will be assigned to the University for the duration of this contract.

The undersigned hereby certifies that he/she is a duly authorized officer of the Proposing Firm and can bind the Proposer to the prices quoted herein.

__________________________
Proposer (Company Name)

__________________________
Authorized Signature

__________________________
Print Name

__________________________
Title

END OF PRICE PROPOSAL FORM
APPENDIX C

CONTRACT FORMS

Contract
Contract Affidavit
Performance Bond
CONTRACT
BETWEEN
THE UNIVERSITY OF MARYLAND, BALTIMORE COUNTY
AND

By this Contract, made as of the day of ______, 2012, by and between The University of Maryland, Baltimore County, a constituent institution of the University System of Maryland, agency of the State of Maryland ("University"), 1000 Hilltop Circle, Baltimore, Maryland 21250, and ________________________________ ("Contractor"), for ( ), the parties hereby agree as follows:

1. **TERM OF CONTRACT:** The term of this Contract shall begin on ______ and terminate on ______.

2. **SCOPE OF CONTRACT:** The Contractor's obligations and duties under this Contract shall include, but are not limited to, the terms, conditions and specifications contained in RFP No. ______ and any amendments or changes thereto as well as the Contractor's proposal submitted in response to the aforementioned RFP (collectively referred to hereinafter as the “Contract Documents”). These obligations and duties are subject to the unilateral right of the University to order, in writing, changes in the work within the scope of the Contract.

3. **COMPENSATION AND METHOD OF PAYMENT:**
   A. As compensation for satisfactory performance of the work described in Paragraph 2, above, the University will pay the Contractor $ ______.
   B. The Contractor's Federal Tax Identification Number or, where applicable, Social Security Number is ________________.
   C. The Contractor shall be paid only for items or services that are specifically named in this Contract. No additional costs for items or services will be paid by the University without its prior express written consent.

4. **DELIVERY:** Delivery shall be made in accordance with bid/RFP specifications. The University reserves the right to test any materials, equipment, supplies or services delivered to determine if the specifications have been met. The materials listed in the specifications shall be delivered FOB the point or points specified prior to or on the date specified in the solicitation. Any material that is defective or fails to meet the terms of the specifications shall be rejected. Rejected materials shall be promptly replaced. The University reserves the right to purchase replacement materials in the open market. Contractors failing to promptly replace materials lawfully rejects shall be liable for any excess price paid for the replacement plus applicable expenses, if any.

5. **NON-HIRING OF EMPLOYEES:** No employee of the State of Maryland or any unit thereof, whose duties as such employee include matters relating to or affecting the subject matter of this Contract, shall, while so employed, become or be an employee of the party or parties hereby contracting with the State of Maryland or any unit thereof.

6. **RESPONSIBILITY OF CONTRACTOR:**
   A. The Contractor shall perform the services with that standard of care, skill and diligence normally provided by a Contractor in the performance of services similar to the services hereunder.
B. Notwithstanding any review, approval, acceptance or payment for the services by the University, the Contractor shall be responsible for professional and technical accuracy of its work, design drawings, specifications and other materials furnished by the Contractor under this Contract.

7. **DISSEMINATION OF INFORMATION:**
   A. During the term of this Contract, the Contractor shall not release any information related to the services or performance of the services under this Contract nor publish any final reports or documents without the prior written approval of the University.
   B. The Contractor shall indemnify and hold harmless the University, its officers, agents and employees, from all liability which may be incurred by reason of dissemination, publication, distribution or circulation, in any manner whatsoever, of any information, data, documents, or materials pertaining in any way to this Contract by the Contractor, its agents or employees.

8. **OWNERSHIP OF DOCUMENTS AND MATERIALS:** The Contractor agrees that all documents and materials, including but not limited to, reports, drawings, studies, specifications, estimates, maps, photographs, designs graphics, mechanical, artwork, and computations prepared by or for it under the terms of this Contract shall at anytime during the performance of the services be made available to the University upon request by the University and shall become and remain the exclusive property of the University upon termination or completion of the services. The University shall have the right to use same without restriction or limitation and without compensation to the Contractor other than that provided by this Contract. The University shall be the owner for purposes of copyright, patent or trademark registration.

9. **PATENTS, COPYRIGHTS AND TRADE SECRETS:**
   A. If the Contractor furnishes any design, device, material, process or other item which is covered by a patent or copyright or which is deemed proprietary to or a trade secret of another, Contractor shall obtain the necessary permission or license to use such item.
   B. Contractor will defend or settle, at its own expense, any claim or suit against the University alleging that any such item furnished by Contractor infringes any patent, trademark, copyright, or trade secret. Contractor also will pay all damages and costs that by final judgment may be assessed against the University due to such infringement and all attorneys’ fees and litigation expenses reasonably incurred by the University to defend against such a claim or suit. The obligations of this paragraph are in addition to those stated in paragraph 16 below.
   C. If any products furnished by Contractor become, or in Contractor’s opinion, are likely to become, the subject of a claim of infringement, Contractor will, at its option: (1) procure for the University the right to continue using the applicable item; (2) replace the product with a non-infringing product substantially complying with the item’s specifications; or (3) modify the item so it becomes non-infringing and performs in a substantially similar manner to the original item.

10. **DISPUTES:** This Contract shall be subject to the provisions of University System of Maryland Procurement Policies and Procedures. Pending resolution of a claim, the Contractor shall proceed diligently with the performance of the Contract in accordance with the Procurement Officer’s decision. Any dispute that is not subject to the
jurisdiction of the Maryland State Board of Contract Appeals, as provided in the University System Procurement Policies and Procedures, shall be brought in and heard by the courts of the State of Maryland, and the parties voluntarily consent to the exclusive jurisdiction of the courts of this State for any such proceeding.

11. **NONDISCRIMINATION IN EMPLOYMENT**: The Contractor agrees: (a) not to discriminate in any manner against an employee or applicant for employment because of race, color, religion, creed, age, sex, sexual orientation, marital status, national origin, ancestry, or physical or mental handicap unrelated in nature and extent so as reasonably to preclude the performance of such employment; (b) to include a provision similar to that contained in subsection (a), above, in any subcontract except a subcontract for standard commercial supplies or raw materials; and (c) to post and to cause subcontractors to post in conspicuous places available to employees and applicants for employment, notices setting forth the substance of this clause.

12. **CIVIL RIGHTS ACT 1964**: Vendors and Contractors providing materials, equipment, supplies or services to the State under this Contract herewith assure the State that they are conforming to the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1988, and the Civil Rights Act of 1991, and Section 202 of Executive Order 11246 of the President of the United States of America as amended by Executive Order 11375, as applicable.

13. **AFFIRMATIVE ACTION**: The Contractor and all subcontractors shall develop and maintain affirmative action plans directed at increasing the utilization of women and members of minority groups on State public works projects, pursuant to the Executive Order 11246 of the President of the United States of America and guidelines on Affirmative Action issued by the Equal Employment Opportunities Commission (EEOC) 29 C.F.R. part 1608 and the Governor of Maryland’s Executive Order 01.01.1993.16.

14. **CONFLICT OF INTEREST LAW**: It is unlawful for any University officer, employee, or agent to participate personally in his official capacity through decision, approval, disapproval, recommendation, advice, or investigation in any contract or other matter in which he, his spouse, parent, child, brother, or sister, has a financial interest or to which any firm, corporation, association, or other organization in which he has a financial interest or in which he is serving as an officer, director, trustee, partner, or employee, or any person or organization with whom he is negotiating or has any arrangement concerning prospective employment, is a party, unless such officer, employee, or agent has previously complied with the provisions of Article 40A, §3-101 et seq of the Annotated Code of Maryland.

15. **CONTINGENT FEE PROHIBITION**: The Contractor, Architect, or Engineer (as applicable) warrants that it has not employed or retained any person, partnership, corporation, or other entity, other than a bona fide employee or agent working for the Contractor, Architect, or Engineer, to solicit or secure this agreement, and that it has not paid or agreed to pay any person, partnership, corporation, or other entity, other than a bona fide employee or agent, any fee or any other consideration contingent on the making of this agreement.

16. **INTELLECTUAL PROPERTY**: Contractor agrees to indemnify and save harmless the State, its officers, agents and employees with respect to any claim, action, cost or judgment for patent infringement, trademark violation arising out of purchase or use of materials, supplies, equipment or services covered by this Contract.
17. **SOFTWARE CONTRACTS**: As specifically provided by Maryland Code Annotated, Commercial Law Article, Section 21-104, the parties agree that this Contract shall not be governed by the Uniform Computer Information Transaction Act (“UCITA”), Title 21 of the Maryland Code Annotated, Commercial Law Article, as amended from time to time. This Contract shall be governed by the common law of Maryland relating to written agreements, as well as other statutory provisions, other than UCITA, which may apply, and shall be interpreted and enforced as if UCITA had never been adopted in Maryland. Vendor agrees that, as delivered to the University, the software does not contain any program code, virus, worm, trap door, back door, timer or clock that would erase data, or programming or otherwise cause the software to become inoperable, inaccessible, or incapable of being used in accordance with its conditions, or manually on command of Vendor.

18. **EPA COMPLIANCE**: Materials, supplies, equipment and services shall comply in all respects with the federal Noise Control Act of 1972, where applicable. Power equipment, to the greatest extent possible, shall be the quietest available. Equipment certified by the US EPA as a Low Noise Emission Product pursuant to the Federal Noise Control Act of 1972 shall be considered to meet the intent of the regulation. The Contractor must supply and have immediately available to their employees spill containment equipment/supplies necessary to contain any hazards they may introduce to the job site. The Contractor is responsible for any and all costs incurred by the University in remediating spills or releases of materials he/she introduced onto the job site.

19. **MULTI-YEAR CONTRACTS CONTINGENT UPON APPROPRIATIONS**: If the General Assembly fails to appropriate funds or if funds are not otherwise made available for continued performance for any fiscal period of this Contract succeeding the first fiscal period, this Contract shall be canceled automatically as of the beginning of the fiscal year for which funds were not appropriated or otherwise made available; provided, however, that this will not affect either the State's rights or the Contractor's rights under any termination clause in this Contract. The effect of termination of the Contract hereunder will be to discharge both the Contractor and the State of Maryland from future performance of the Contract, but not from their rights and obligations existing at the time of termination. The Contractor shall be reimbursed for the reasonable value of any non-recurring costs incurred but not amortized in the price of the Contract. The State shall notify the Contractor as soon as it has knowledge that funds may not be available for the continuation of this Contract for each succeeding fiscal period beyond the first.

20. **TERMINATION FOR DEFAULT**: If the Contractor fails to fulfill its obligation under this contract properly and on time, or otherwise violates any provision of the contract, the University may terminate the contract by written notice to the Contractor. The notice shall specify the acts or omissions relied upon as cause for termination. All finished or unfinished work provided by the Contractor shall, at the University's option, become the University's property. The University shall pay the Contractor fair and equitable compensation for satisfactory performance prior to receipt of notice of termination, less the amount of damages caused by Contractor's breach. If damages are more than the compensation payable to the Contractor, the Contractor will remain liable after termination and the University can affirmatively collect damages. Termination hereunder, including the determination of the rights and obligations of the parties, shall be governed by the provisions of USM Procurement Policies and Procedures.
21. **TERMINATION FOR CONVENIENCE:** The performance of work under this Contract may be terminated by the University in accordance with this clause in whole, or from time to time in part, whenever the University shall determine that such termination is in the best interest of the University. The University will pay all reasonable costs associated with this Contract that the Contractor has incurred up to the date of termination and all reasonable costs associated with termination of the Contract. However, the Contractor shall not be reimbursed for any anticipatory profits that have not been earned up to the date of termination. Termination hereunder, including the determination of the rights and obligations of the parties, shall be governed by the provisions of USM Procurement Policies and Procedures.

22. **TERMINATION OF MULTIYEAR CONTRACTS:** If the General Assembly fails to appropriate funds or if funds are not otherwise made available for continued performance for any fiscal period of this Contract succeeding the first fiscal period, this Contract shall be canceled automatically as of the beginning of the fiscal year for which funds were not appropriated or otherwise made available; provided, however, that this will not affect either the State’s rights or the Contractor’s rights under any termination clause in the Contract. The effect of termination of the Contract hereunder will be to discharge both the Contractor and the State from future performance of the Contract but not from their rights and obligations existing at the time of termination. The Contractor shall be reimbursed for the reasonable value of any non-recurring costs incurred but not amortized in the price of the Contract. The State shall notify the Contractor as soon as it has knowledge that funds may not be available for the continuation of this Contract for each succeeding fiscal period beyond the first.

23. **DELAYS AND EXTENSIONS OF TIME:** The Contractor agrees to perform this agreement continuously and diligently. No charges or claims for damages shall be made by the Contractor for any delays or hindrances, regardless of cause, in the performance of services under this Contract. Time extensions will be granted only for excusable delays that arise from unforeseeable causes beyond the control and without the fault or negligence of the Contractor, including but not restricted to, acts of God, acts of the public enemy, acts of the State in either its sovereign or contractual capacity, acts of another Contractor in the performance of a State Contract, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, or the delay of a sub-contractor or supplier arising from unforeseeable causes beyond the control and without the fault or negligence of either the Contractor or the subcontractors or suppliers.

24. **VARIATIONS IN ESTIMATED QUANTITIES:** [Delete is not applicable - if contract does not contain estimated quantity items.] No equitable adjustment shall be permitted in favor of either the State of Maryland or the Contractor in the event that the quantity of any pay item in this Contract is an estimated quantity and the actual quantity of such pay item varies from the estimated quantity stated in the Contract.

25. **LIQUIDATED DAMAGES:** [To be included where deemed appropriate by the Procurement Officer or insert “N/A”] Time is an essential element of the Contract and it is important that the work be vigorously prosecuted until completion. For each day that any work shall remain uncompleted beyond the time(s) specified elsewhere in the contract, the Contractor shall be liable for liquidated damages in the amount(s) provided for in the solicitation, provided, however, that the due account shall be taken of any
adjustment of the specified completion time(s) for completion of work as granted by approved change orders.

26. **SUSPENSION OF WORK**: The procurement officer unilaterally may order the Contractor in writing to suspend, delay or interrupt all or any part of the work for such period of time as the Procurement Officer may determine to be appropriate for the convenience of the University.

27. **PRE-EXISTING REGULATIONS**: In accordance with the provisions of Section 11-206 of the State Finance and Procurement Article, Annotated Code of Maryland, the regulations set forth in USM Procurement Policies and Procedures in effect on the date of execution of this Contract are applicable to this Contract.

28. **FINANCIAL DISCLOSURE**: The Contractor shall comply with the provisions of Section 13-221 of the State Finance and Procurement Article of the Annotated Code of Maryland, as from time to time amended, which requires that every business that enters into contracts, leases or other agreements with the State of Maryland or its agencies during a calendar year under which the business is to receive in the aggregate $100,000 or more, shall, within 30 days of the time when the aggregate value of these contracts, leases or other agreements reaches $100,000, file with the Secretary of State of Maryland certain specified information to include disclosure of beneficial ownership of the business.

29. **POLITICAL CONTRIBUTION DISCLOSURE**: The Contractor shall comply with Article 33, Sections 14-101 through 14-104, of the Annotated Code of Maryland, which requires that every person that enters into contracts, leases, or other agreements with the State, a county, or an incorporated municipality, or their agencies, during a calendar year under which the person receives in the aggregate $100,000 or more shall file with the State Administrative Board of Election Laws a statement disclosing contributions in excess of $500 to a candidate for elective office in any primary or general election. The statement shall be filed with the State Administrative Board of Election Laws: (1) before a purchase or execution of a lease or contract by the State, a county, an incorporated municipality, or their agencies, and shall cover the preceding two calendar years; and (2) if the contribution is made after the execution of a lease or contract, then twice a year, throughout the contract term, on: (a) February 5, to cover the 6-month period ending January 31; and (b) August 5, to cover the 6-month period ending July 31.

30. **RETENTION OF RECORDS**: The Contractor shall retain and maintain all records and documents relating to this Contract for three (3) years after final payment by the University hereunder or any applicable statute of limitations, whichever is longer, and shall make them available for inspection and audit by authorized representatives of the University, including the Procurement Officer or the Procurement Officer's designee, at all reasonable times.

31. **AUDIT**: The University reserves the right to request an independent review of the Contractor’s financial operations and overall contract compliance (“Review”). The Review would be at the Contractor’s expense and comprised of an agreed upon procedures engagement by an independent certified public accountant with a protocol acceptable to both parties at the time of the request.
COMPLIANCE WITH LAWS: The Contractor hereby represents and warrants that:

A. It is qualified to do business in the State of Maryland and that it will take such action as, from time to time hereafter, may be necessary to remain so qualified;

B. It is not in arrears with respect to the payment of any monies due and owing the State of Maryland, or any department or unit thereof, including but not limited to the payment of taxes and employee benefits, and that it shall not become so in arrears during the term of this Contract;

C. It shall comply with all federal, State and local laws, regulations, and ordinances applicable to its activities and obligations under this Contract; and

D. It shall obtain at its expense, all licenses, permits, insurance, and governmental approval, if any, necessary to the performance of its obligations under this Contract.

COST AND PRICE CERTIFICATION: By submitting cost or price information, the Contractor certifies to the best of its knowledge that the information submitted is accurate, complete, and current as of a mutually determined specified date prior to the conclusion of any price discussions or negotiations for:

A. A negotiated contract, if the total contract price is expected to exceed $100,000, or a smaller amount set by the procurement officer; or

B. A change order or contract modification, expected to exceed $100,000, or a smaller amount set by the procurement officer.

C. The price under this Contract and any change order or modification hereunder, including profit or fee, shall be adjusted to exclude any significant price increases occurring because the Contractor furnished cost or price information which, as of the date agreed upon between the parties, was inaccurate, incomplete, or not current.

TRUTH-IN NEGOTIATION CERTIFICATION: [Mandatory provision for architectural services or engineering services contracts exceeding $100,000. It shall be in substantially the same form as follows: or insert “N/A” if not applicable.] The Contractor by submitting cost or price information, including wage rates or other actual unit costs, certifies to the best of its knowledge, information and belief, that:

A. the wage rates and other factual unit costs supporting the firm's compensation, as set forth in the proposal, are accurate, complete and current as of the contract date;

B. if any items of compensation were increased due to the furnishing of inaccurate, incomplete or noncurrent wage rates or other units of costs, the State is entitled to an adjustment in all appropriate items of compensation, including profit or fee, to exclude any significant sum by which the price was increased because of the defective data. The University's right to adjustment includes the right to a price adjustment for defects in costs or pricing data submitted by a prospective or actual subcontractor; and

C. If additions are made to the original price of the contract, such additions may be adjusted to exclude any significant sums where it is determined the price has been increased due to inaccurate, incomplete or noncurrent wage rates and other factual costs.
35. **PAYMENT OF UNIVERSITY OBLIGATIONS**: Payments to the Contractor pursuant to this Contract shall be made no later than 30 days after the University's receipt of a proper invoice from the Contractor. Each such invoice must reflect the Contractor's federal tax identification number. Charges for late payment of invoices, other than as prescribed by Title 15, Subtitle 1, of the State Finance and Procurement Article, Annotated Code of Maryland, as from time to time amended, are prohibited.

36. **SET-OFF**: The University may deduct from and set-off any amounts due and payable to the Contractor any back-charges or damages sustained by the University by virtue of any breach of this Contract by the Contractor or by virtue of the failure or refusal of the Contractor to perform the services or any part of the services in a satisfactory manner. Nothing herein shall be construed to relieve the Contractor of liability for additional costs resulting from a failure to satisfactorily perform the services.

37. **INDEMNIFICATION**: The University shall not assume any obligations to indemnify, hold harmless, or pay attorneys’ fees that may arise from or in any way be associated with the performance or operation of this Contract.

38. **PROHIBITION AGAINST SHIFTING MARYLAND INCOME TO OUT-OF-STATE AFFILIATES**: Contractor may not, for any period during the Contract term, seek to reduce the amount of Contractor’s income subject to Maryland income tax by payments made to an affiliated entity or an affiliate’s agent for the right to use trademarks, trade names, or other tangible property associated with Contractor. Contractor agrees that during the course of this Contract it shall not make any such royalty or similar payments to any affiliated company; and if any such royalty or similar payments are made, Contractor and the affiliated company shall file separate Maryland income tax, under a formula that reasonably apportions the income of the affiliated company among the states, including Maryland, in which the Contractor does business. Contractor agrees that it is authorized to bind its affiliated entities to the terms hereof.

39. **USE OF CONTRACTOR’S FORMS NOT BINDING ON STATE**:
   
   A. The use or execution by the University of any forms, orders, agreements, or other documents of any kind, other than the Contract documents, used pursuant to or in the administration of any contract awarded by the University to the Contractor, shall not bind the University to any of the terms and conditions contained therein except those provisions:
      
      (1) Generally describing for the purposes of ordering: equipment or services to be provided, locations, quantities, delivery or installation dates, and, to the extent consistent with the Contract Documents, prices; and
      (2) not otherwise inconsistent with the Contract Documents.
   
   B. Any such form, order, or others document shall not vary, modify, or amend the terms and provisions of the Contract Documents, notwithstanding any provision to the contrary in such document, unless all of the following conditions are met:
      
      (1) the document expressly refers to the particular document and provision of the Contract Documents being modified and plainly and conspicuously identifies any modifications thereto as a modification; and
      (2) the document is executed on behalf of the University by the procurement officer; and
(3) execution of the document is approved by the procurement authority whose approval is required by law.

40. **ASSIGNMENT:** This Contract and the rights, duties, and obligations hereunder may not be assigned or subcontracted by Contractor without the prior written consent of the University.

41. **WAIVER OF JURY:** UNIVERSITY AND CONTRACTOR, HEREBY WAIVE TRIAL BY JURY IN ANY ACTION OR PROCEEDING TO WHICH THEY ARE PARTIES ARISING OUT OF OR IN ANY WAY PERTAINING TO THIS CONTRACT. IT IS AGREED AND UNDERSTOOD THAT THIS WAIVER CONSTITUTES A WAIVER OF TRIAL BY JURY OF ALL CLAIMS AGAINST ALL PARTIES WHO ARE NOT PARTIES TO THIS CONTRACT. THIS WAIVER IS KNOWINGLY, WILLINGLY AND VOLUNTARILY MADE BY UNIVERSITY AND CONTRACTOR, WHO HEREBY REPRESENT AND WARRANT THAT NO REPRESENTATIONS OF FACT OR OPINION HAVE BEEN MADE BY AN INDIVIDUAL TO INDUCE THIS WAIVER OF TRIAL BY JURY OR TO IN ANY WAY MODIFY OR NULLIFY ITS EFFECT.

42. **MARYLAND LAW:** This Agreement shall be governed by and construed in accordance with the laws of the State of Maryland, without regard to its conflicts of law or choice of law principles.

43. **FORCE MAJEURE:** If either party’s performance(s) hereunder is rendered impossible, hazardous or is otherwise prevented or impaired due to sickness, inability to perform, accident, interruption or failure of means of transportation, Act(s) of God, riots, strikes, labor difficulties, epidemics, earthquakes, any act or order of any public authority, and/or any other cause or event, similar or dissimilar, beyond that party’s control, then each party’s obligations with respect to the affected performance(s) shall be excused and neither party will have any liability in connection therewith.

44. **SUCCESSORS AND ASSIGNS.** This Agreement will bind upon and inure to the benefit of the parties hereto and their respective personal representatives/successors and assigns. Successors and assigns shall agree to assume in writing the obligations under this Contract.

45. **COMPLIANCE WITH FERPA:** The University agrees that, for purposes of the Family Educational Rights and Privacy Act of 1974 (20 U.S.C. § 1232g) as amended (“FERPA”), the Contractor will be considered a contractor to whom functions and services have been outsourced by the University. As a result of these function and services, the Contractor might have access to educational records, as defined by FERPA. Contractor agrees that it shall not re-disclose personally identifiable educational records that it receives from the University pursuant to this Agreement, unless such disclosure is authorized to perform the functions and services provided through this agreement or is authorized under FERPA. Contractor expressly warrants and represents that it shall not use the student information or educational records provided by the University for any purpose other than to comply with the terms of this Agreement with the University. Contractor shall indemnify and hold harmless the University from and against any and all claims, suits, proceedings, costs, losses, damages, liabilities, expenses, demands, and judgments, including court costs, attorney's fees, and other reasonable expenses of litigation, which may arise out of, relate to, or be a consequence of, an unauthorized disclosure of educational records. Contractor will, upon discovery, or
receipt of notice, of a potential, or actual, material unauthorized disclosure of educational records, immediately report said occurrence to the University. Contractor will work with the University to remediate the unauthorized disclosure (or anticipated unauthorized disclosure) at the expense of Contractor. The terms of the remediation are the sole and exclusive determination of the University.

46. **CONTRACT CONTROLS**: It is mutually agreed that any attached contract, or addenda thereto, by and between the University and the Contractor pertaining to this Contract is supplemental and subordinate to this University of Maryland, Baltimore County Contract. The terms and conditions of this University of Maryland, Baltimore County Contract shall, at all times and in all events and situations, be controlling.

47. **CONTRACT AFFIDAVIT**: The Contract Affidavit required by the USM Procurement Policies and Procedures, consisting of Authorized Representative statement, Certification of Corporate Registration and Tax Payment, and Certain Affirmations Valid is attached and is a part of this Contract that must be executed by an authorized representative of the Contractor.

48. **ENTIRE AGREEMENT**:

A. This Contract constitutes the entire agreement of the parties and supersedes all prior written or oral and all contemporaneous oral agreements, understandings, and negotiations between the parties with respect to the subject matter hereof. This Contract is intended by the parties as the final expression of their agreement and may not be contradicted by evidence of any prior or contemporaneous agreement.

B. **Headings**: All headings are for reference purposes only and must not affect the interpretation of this Contract. All references to days in this Agreement mean calendar days, unless otherwise expressly stated. All references to including mean including without limitation.

C. **Partial Invalidity**: Any provision of this Contract which is found to be invalid or unenforceable shall be ineffective to the extent of such invalidity or unenforceability, and the invalidity or unenforceability of such provision shall not affect the validity or enforceability of the remaining provisions hereof.

D. **Notices**: Any notice required to be given hereunder shall be deemed to have been given either when served personally, by facsimile, or when sent by first class mail addressed to the parties at the addresses set forth in this Agreement.

E. **Counterparts**: This Contract may be executed simultaneously, in two (2) or more counterparts, each of which shall be deemed an original and all of which, when taken together, shall constitute one and the same document. The signature of any party to any counterpart shall be deemed a signature to, and may be appended to any other counterpart.

(Signatures to be placed on the following page)
IN WITNESS WHEREOF, the parties have caused this Contract to be executed on their behalf by the undersigned as of the date first shown above.

Contractor:

___________________________________
Witness

___________________________________
Witness

University of Maryland Baltimore County

BY: _______________________________
Signature

___________________________________
Typed/Printed Name

___________________________________
Title

___________________________________
Date

___________________________________
Telephone Number

BY: _______________________________
Signature

___________________________________
Typed/Printed Name

___________________________________
Title

___________________________________
Date

___________________________________
Telephone Number
**CONTRACT AFFIDAVIT**

A. **AUTHORIZED REPRESENTATIVE**

I HEREBY AFFIRM THAT:

I am the (title) _____________________________ and the duly authorized representative of (business) ____________________________________ and that I possess the legal authority to make this Affidavit on behalf of myself and the business for which I am acting.

B. **CERTIFICATION OF CORPORATION REGISTRATION AND TAX PAYMENT**

I FURTHER AFFIRM THAT:

(1) The business named above is a (___domestic) (___foreign) corporation registered in accordance with the Corporations and Associations Article, Annotated Code of Maryland, and that is in good standing and has filed all of its annual reports, together with filing fees, with the Maryland State Department of Assessments and Taxation, and that the name and address of its current resident agent is filed with the State Department of Assessments and Taxation is:

   Name: ____________________________________________

   Address: ____________________________________________

   City, State, Zip: ____________________________________________

(2) Except as validly contested, the business had paid, or has arranged for payment of, all taxes due the State of Maryland and has filed all required returns and reports with the Comptroller of the Treasury, the State Department of Assessments and Taxation, and the Department of Labor, Licensing, and Regulation, as applicable, and will have paid all withholding taxes due the State of Maryland prior to final settlement.

C. **CERTAIN AFFIRMATIONS VALID**

I FURTHER AFFIRM THAT:

To the best of my knowledge, information and belief, each of the affirmations, certifications, or acknowledgements contained in that certain Bid/Proposal Affidavit dated __________20_____, and executed by me or for the purpose of obtaining the contract to which this Exhibit is attached remains true and correct in all respects as if made as of the date of this Contract Affidavit and as if fully set forth herein.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

Date: _____________________________ By: _____________________________

(Authorized Representative & Affiant)

12.00061 (04/02)

END OF FORM
PERFORMANCE BOND

Principal

Business Address of Principal

Surety

Obligee

STATE OF MARYLAND

a corporation of the State of ________________________________

By and through the following

and authorized to do business in the State of Maryland

Administration ________________________________

Penal Sum of Bond (express in words and figures) Date of Contract

___________________________________________________________________________ 20_________

Description of Contract Date Bond Executed

___________________________________________________________________________ 20_________

Contract Number:

KNOW ALL MEN BY THESE PRESENTS, That we, the Principal named above and Surety named above, being authorized to do business in Maryland, and having business addresses as shown above, are held and firmly bound unto the Obligee named above in Penal Sum of this Performance Bond stated above, for the payment of which Penal Sum we bind ourselves, our heirs, executors, administrators, personal representatives, successors, and assigns, jointly and severally, firmly by these presents. However, where Surety is composed of corporations acting as co-sureties, we, the co-sureties, bind ourselves, our successors and assigns, in such Penal Sum jointly and severally as well as severally only for the purpose of allowing a joint action or actions against any or all of us, and for all other purposes each co-surety binds itself, jointly and severally with the Principal, for the payment of such sum as appears above its name below, but if no limit of liability is indicated, the limit of such liability shall be the full amount of the Penal Sum.

WHEREAS, Principal has entered into or will enter into a contract with the State of Maryland, by and through the Administration named above acting for the State of Maryland, which contract is described and dated as shown above, and incorporated herein by reference. The contract and all items incorporated into the contract, together with any and all changes, extensions of time, alterations, modifications, or additions to the contract or to the work to be performed thereunder or to the Plans, Specifications, and Special Provisions, or any of them, or to any other items incorporated into the contract shall hereinafter be referred to as “the Contract.”

WHEREAS, it is one of the conditions precedent to the final award of the Contract that these presents be executed.

NOW, THEREFORE, during the original term of said Contract, during any extensions thereto that may be granted by the Administration, and during the guarantee and warranty period, if any, required under the Contract, unless otherwise stated therein, this Performance Bond shall remain in full force and effect unless and until the following terms and conditions are met:

1. Principal shall well and truly perform the Contract; and
2. Principal and Surety shall comply with the terms and conditions contained in this Performance Bond.

Whenever Principal shall be declared by the Administration to be in default under the Contract, the Surety may, within 15 days after notice of default from the Administration, notify the Administration of its election to either promptly proceed to remedy the default or promptly proceed to complete the contract in accordance with and subject to its terms and conditions. In the event the Surety does not elect to exercise either of the above stated options, then the Administration thereupon shall have the remaining contract work completed, Surety to remain liable hereunder for all expenses of completion up to but not exceeding the penal sum stated above.

The Surety hereby stipulates and agrees that no change, extension of time, alteration or addition to the terms of the Contract or to the work to be performed thereunder or to the Specifications accompanying the same shall in any way affect its obligations on this Performance Bond, and it does hereby waive notice of any such change, extension of time, alteration or addition to the terms of the Contract or to the work or to the Specifications.

This Performance Bond shall be governed by and construed in accordance with the laws of the State of Maryland and any reference herein to Principal or Surety in the singular shall include all entities in the plural who or which are signatories under the Principal or Surety heading below.
IN WITNESS WHEREOF, Principal and Surety have set their hands and seals to this Performance Bond. If any individual is a signatory under the Principal heading below, then each such individual has signed below on his or her own behalf, has set forth below the name of the firm, if any, in whose name he or she is doing business, and has set forth below his or her title as a sole proprietor. If any partnership or joint venture is a signatory under the Principal heading below, then all members of each such partnership or joint venture have signed below, each member has set forth below his or her title as a general partner, limited partner, or member of joint venture, whichever is applicable. If any corporation is a signatory under the Principal or Surety heading below, then each such corporation has caused the following: the corporation’s name to be set forth below, a duly authorized representative of the corporation to affix below the corporation’s seal and to attach hereto a notarized corporate resolution or power of attorney authorizing such action, and each such duly authorized representative to sign below and to set forth below his or her title as a representative of the corporation. If any individual acts as a witness to any signature below, then each such individual has signed below and has set forth below his or her title as a witness. All of the above has been done as of the Date of Bond shown above.

In Presence of Witness

(SEAL)

In Presence of Witness

(SEAL)

(SEAL)

(SEAL)

(SEAL)

In Presence of Witness

Co-Partnership Principal

(Name of Co-Partnership)

By:

(SEAL)

(SEAL)

(SEAL)

(SEAL)

Corporate Principal

(Name of Corporation)

AFFIX

By:

CORPORATE

President

SURETY

Title:

(Surety)

AFFIX

Attest:

CORPORATE SEAL

By:

Signature

Bonding Agent’s Name

Agent’s Address

Business Address of Surety

(Approved as to legal form and sufficiency)
this __________ day of ______________________________ 20 __________

_____________________________________________________
Attorney
APPENDIX D

UMBC WEBSITE /CAMPUS MAP
APPENDIX D

1. UMBC WEBSITE / MAP

1.1 UMBC Website:  www.umbc.edu

1.2 UMBC Map:  http://www.umbc.edu/aboutumbc/campusmap/

END OF SECTION VI - APPENDIXES

END OF RFP DOCUMENT