Request for Proposal – Cover Page
Call Center Services

Pima County Community College District ("College") is seeking proposals from qualified firms for Call Center Services in support of its IT Helpdesk and Student Financial Services (Financial Aid/Student Accounts).

The deadline for receipt of sealed proposals is: **Friday, May 11, 2012 at 3:00 PM (Arizona Time).**
Sealed proposals must be received by this deadline at the following location:

Pima County Community College District
District Finance Office-Purchasing
4905D East Broadway, Room D-232
Tucson, Arizona 85709-1420

**Proposals received after the date/time listed above will be returned and will not be considered.**

**Entity Submitting Proposal:** The terms “vendor”, “proposer”, “offerer”, “firm”, “consultant”, “company” or “contractor” used in this Request For Proposal (RFP) or in any and all subsequent documents or communications related to this RFP are interchangeable and mean the entity submitting a proposal and seeking to enter into a contract with the College for the goods and/or services requested in this RFP.

Questions pertaining to this Request for Proposal must be communicated in writing and be received via email by **Friday, April 20, 2012 at 3:00 PM (Arizona Time).** Questions must be sent to the indicated Senior Buyer at the email address below and should include the proposal number. All questions should include a reference to the appropriate section number and page of the RFP. Questions and answers will be posted on the Pima Community College webpage listed below by **Friday, April 27, 2012 by 5:00 PM (Arizona Time).**

Philip Quintanilla, Senior Buyer
DO-Staff-FO-Procur@pima.edu

Copies of this Request for Proposal, all questions and answers, and any related documents are available on the Pima Community College Webpage:
http://www.pima.edu/administrative-services/purchasing/current-requests-for-proposals-bids-quotes.html

Purchasing Director
Pima County Community College District
District Finance Office-Purchasing
4905 East Broadway, Room D-232
Tucson, Arizona 85709-1420
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Section 1

Project Summary

1. Request for Proposal Summary

Pima County Community College District ("College," or "District") is seeking proposals from qualified firms for Call Center Services in accordance with the Scope of Work specified in this Request for Proposal (RFP). The College desires to partner with a company to provide telephone, chat and e-mail support services to handle calls for IT Helpdesk and Student Financial Services (Financial Aid and Student Accounts). Proposals should address either one or both of these areas. While Financial Aid and Student Accounts are separate functional areas within the College, transparent Student Financial Services call support is required for anyone requesting assistance. Services are required to support students, faculty and staff. PCC is looking for a tiered business model that will include clear escalation policies, knowledge management, service level agreements, data analytics, metrics and extended hours of support.

2. Description of Pima County Community College District

Pima County Community College District, located in Tucson, Arizona, is one of the ten largest multi-campus, multi-site community colleges in the United States. The College is a two-year institution offering both occupational and traditional college courses, and awards many different degrees and certificates. The College’s comprehensive curriculum includes credit courses, workforce development programs (Center for Training and Development), adult education special programs (GED), as well as corporate and community based non-credit instruction. Students attend classes at six major campuses including the Community Campus, which itself holds classes at over 70 locations in southern Arizona. The College employs more than 1,400 regular employees, approximately 1,500 adjunct faculty and 500 part-time personnel. More than 70,000 students attend credit and non-credit classes annually. The population for the Tucson metro area is approximately 1 million people. The College is accredited by the Commission on Institutions of Higher Education of the North Central Association of Colleges and Schools.

3. Description of Student Financial Services

Student Financial Services includes a Financial Aid Department and a Student Accounts Department, but because of the nature of financial aid processing, there is significant overlap of some questions handled by a call support center. The Financial Aid office receives approximately 37,000 financial aid applications a year. Approximately 70% are selected for verification. Student Accounts supports financial aid students by processing approximately 55,000 financial aid refunds per year, primarily during the peak times of August and January. Student Accounts also supports payment arrangements for all students, including payments by 3rd party contracts, veteran and military students, payment plans, and direct payments. For purposes of this RFP, the Financial Aid and Student Accounts functions are to be considered as one functional area for call support.
Section 2
Scope of Work

College operations require a high level of customer service support in both the IT Helpdesk and Student Financial Services functions. The types of call center support services required of the successful offering firm include telephone, email and chat coverage. The IT Helpdesk supports all students, faculty and staff of the College around the clock while Student Financial Services supports the financial transactions for all students from initial application until graduation.

1. Key Project Deliverables
The key project deliverables for the implementation and operation of an effective call center to support either one or both of the functional areas identified in this Request for Proposal are those identified in this Section 2 – Scope of Work. The successful proposer will be the one which most ably demonstrates the ability to a) meet all due dates and comply with the terms and conditions of this RFP, b) handle the indicated call volumes (peak and annual) while meeting/exceeding the minimum service standards, c) effectively interface with all necessary College technology platforms, and d) appropriately address the topics, issues and concerns identified by the various functional areas.

With respect to responses to this RFP, Section 3 of this package provides a detailed listing of the deliverables that the college is expecting in any and all responses. There is also a summary checklist included as Attachment F in the Appendix to this RFP which is provided as a convenience to offering firms, but is not intended to be all-inclusive or to imply acceptance or evidence of compliance by its use. It is the offering firm’s responsibility to submit complete and compliant proposals.

2. Timeline and Due Dates

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<tr>
<th>Event</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>RFP Issue Date</td>
<td>Friday, March 30, 2012</td>
</tr>
<tr>
<td>Questions due</td>
<td>Friday, April 20, 2012</td>
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<tr>
<td>Responses to questions</td>
<td>Friday, April 27, 2012</td>
</tr>
<tr>
<td>Proposals due</td>
<td>Friday, May 11, 2012</td>
</tr>
<tr>
<td>Evaluation Period</td>
<td>Mid-May to Mid-June</td>
</tr>
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<td>Finalists Presentations (Est.)</td>
<td>Late June</td>
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<td>Contract awarded (Est.)</td>
<td>Mid-August</td>
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<tr>
<td>Implementation (Est.)</td>
<td>Fall, 2012</td>
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<tr>
<td>“Go Live”</td>
<td>December 1, 2012</td>
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</tbody>
</table>

3. Minimum Service Standards
The minimum acceptable standards of service, based on recent monthly averages must be:

- 24/7 coverage required, including weekends and holidays
- Customer satisfaction will be consistently in top quartile
- Abandonment rate will not exceed 15%, i.e., 85% of all incoming calls answered
- Talk time for IT support (only) to be less than 10 minutes
- Response time for phone/chat to be less than 120 sec peak, 60 sec non-peak
- Response time for email to be less than 5 minutes
- 95% resolution rate for first point of contact
4. **Historical Call Volume**

The following is a summary of the College call contact volume by functional area during FY2011:

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Annual Volume</th>
<th>August Peak</th>
<th>January Peak</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid</td>
<td>150,000</td>
<td>43,000</td>
<td>22,000</td>
</tr>
<tr>
<td>Student Accounts</td>
<td>50,000</td>
<td>19,000</td>
<td>9,000</td>
</tr>
<tr>
<td>Subtotal - SFS</td>
<td>200,000</td>
<td>62,000</td>
<td>31,000</td>
</tr>
<tr>
<td>IT Helpdesk</td>
<td>54,000</td>
<td>10,000</td>
<td>9,000</td>
</tr>
<tr>
<td>Total Call Volume</td>
<td>254,000</td>
<td>72,000 (29%)</td>
<td>40,000 (16%)</td>
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</table>

5. **Technical Requirements**

The College uses the following systems to support Student Financial Services and the IT Helpdesk:

- SunGard Banner ERP
- Luminus portal
- Desire 2 Learn LMS
- Microsoft Exchange 2007 for faculty and staff
- Google email (Gmail) for students
- OS distribution on college computers: 60% Windows 7; 30% Windows XP; 10% Mac OS.
- Federal Websites required by the U.S. Department of Education and Veteran’s Administration

6. **Functional Area Topics to be Addressed**

The following topics, issues and questions have been generated by employees in the various functional areas affected by this RFP and should be addressed as an integral part of the Scope of Work. Proposals should speak to the items below clearly and succinctly:

**A. Describe the offering firm’s background and experience:**

1. Relevant call center experience specific to each of the types of services requested
2. Experience in serving higher education students and/or public sector clients
3. Qualifications of call center staff to handle support responsibilities
4. Experience serving Sungard Banner, Luminis, and Desire 2 Learn
5. Security and training measures taken to properly handle confidential student information
6. Support for ADA compliance, including any limitations
7. Call center staffing including multiple locations or home-based staff
8. Links to any demonstrations/simulations of your service

**B. Describe the following service elements of the offering firm:**

1. How the firm would build a centralized call center to support anticipated call volume
2. Detailed implementation plan and timeframes
3. How representatives will be trained to meet minimum service standards
4. How representatives handle contacts that include both Financial Aid and Student Accounts issues
5. Measures the firm takes to ensure confidentiality and security in dealing with personal data in relation to FERPA and to meet federal financial aid compliance regulations
6. How the firm maintains the representatives’ level of training for the duration of the contract
7. How a “knowledge base” will be maintained to ensure relevance and how utilization of knowledge base articles will be tracked; how representatives maintain/update knowledge base
8. How staffing will be managed during call volume peaks (January and August)
9. How callbacks will be handled and measured
10. How service escalations occur, and what will be done to track resolution
11. What ticketing system is used by the firm, and how is it integrated with other vendors’ solutions
12. Outline experience with non-English speaking customers
13. Detail plans for initial and ongoing training and development and how that training will be tracked
14. What is the training approach for regulatory compliance and updates to Title IV regulatory issues
15. Outline organizational criteria to assess representatives’ knowledge and ability to perform
16. What assessment tools are used to determine representative’s knowledge

C. **Describe how metrics and reporting will be handled:**

1. List all metrics to be captured, frequency of capture and how the data will be accessed
2. How monthly and annual service level metrics will be provided
3. How long customer interactions are stored for quality tracking purposes
4. How employee performance is measured, including corrective action, recognition, and performance measurements. Describe the process whereby the College can request removal of a CCSR for poor performance
5. How customer satisfaction is tracked and handled. Please provide examples of periodic surveys used for students, faculty and staff
Section 3
Proposal Preparation and Submission Instructions

Proposals must conform to all requirements stated below and elsewhere in this RFP. Disregarding these requirements may result in disqualification of the proposal. Proposals should clearly identify whether the firm is proposing a call center to support the IT Helpdesk, Student Financial Services, or both.

Before submitting a proposal, each firm shall familiarize itself with the entire RFP, including Scope of Work, contract form (including Terms and Conditions), etc. as well as all laws, regulations and other factors affecting contract performance in the State of Arizona. The firm shall be responsible for fully understanding the requirements of a subsequent contract and otherwise satisfying itself as to the expense and difficulties accompanying the fulfillment of contractual requirements. The submission of a proposal will constitute a representation of compliance by the firm. There will be no subsequent financial adjustment for lack of such familiarization.

All proposal materials must be placed in a sealed package (envelope, box, etc.) clearly marked with the proposal name and number and the firm’s name. It is the responsibility of the firm to ensure that proposals are received in the Office of the Purchasing Director by the due date and time stated on page 1 of this RFP. The firm is responsible for delivery of their proposal by the deadline notwithstanding any claims of error or failure to perform by a mail, courier or package delivery service. No proposals or proposal modifications may be submitted orally, electronically, or via telephone, facsimile or electronic mail (email).

All proposals must be typewritten on standard paper size (8½ x 11 inches) and shall be in the required format incorporating the forms provided in this RFP package, if any. It is permissible to copy these forms as required. The authorized person signing the proposal shall initial erasures, interlineations or other modifications on the proposal.

The firm’s proposal should be organized in sections as outlined below:

1. **Cover Letter**

   All proposals must include a cover letter submitted under the firm’s name on the firm’s letterhead containing the signature and title of a person or an official of the firm who is authorized to commit the firm to a potential contract with the College. The cover letter must also identify the primary contact for this proposal and include the College’s RFP number found within this RFP. The cover letter should express the firm’s interest and serve as an executive summary of the proposal. Claims of proprietary information must be included in the cover letter.

2. **Proposal Form**

   All proposals must include the complete Proposal Form (Attachment A) signed by an appropriate official authorized to commit the firm to a contract with the College.
3. Qualifications

The offering firm’s proposal must describe the firm’s qualifications to provide the requested products and/or services, and include the following:

A. Company Overview
B. Corporate Structure
   1. Legal entity
   2. State of registration or incorporation
   3. Public Company – listing symbol
   4. Majority Ownership
C. Operating History
   1. Years in business
   2. Growth Rate
   3. Services
   4. Hours of operation
   5. Financial condition (attach last 5 years' financial statements in Appendix)
D. Number of centers and their locations
E. Volume handled
   1. Number of clients – number of new/lost clients in last two years
   2. Calls handled – average per day
   3. Multimedia transactions per day
   4. Contact types (customer service, tech support, financial aid)
F. Core Business Strategy
G. Organization Structure
   1. Staff expertise – hands-on experience of key management and proposed staff
   2. Implementation Expertise – work structure and methodology
H. Technology and networks overview
   1. Data networks
   2. Voice networks including long distance company
   3. Switching equipment
   4. Voice response
   5. Applications

4. Response to Scope of Work

Responses must be clear and thorough, but concise, and written in plain, easy to understand language. Responses must reference the numbering format used in Section 2 - Scope of Work.

5. Exceptions Requested

Any exceptions to the requirements of this RFP that the firm requests the College to consider must be placed in this section. Each alternate or exception should be addressed separately with specific reference to the requirement. If there are no proposed alternates or exceptions, a statement to that effect must be included in this section of the proposal. Any proposed terms and conditions, contracts, waivers, licenses or agreements required by the firm should be included here with a brief explanatory introduction.
6. Cost Proposal

A detailed cost proposal must be provided and placed in a separate, sealed envelope, marked “Cost Proposal”, clearly marked with the proposal number and the firm's name. Proposals should clearly identify whether the firm is proposing a call center to support the IT Helpdesk, Student Financial Services, or both. Offering firms should complete the Cost Proposal (Attachment B) and use it as a guide to prepare their detailed supporting financial documentation. One copy of the Cost Proposal is required to be included with the original proposal. This information will be considered during the initial stages of the evaluation process.

Additional pricing requirements:

A. Prices shall be shown by item and individually extended, unless otherwise indicated. In case of a conflict between unit price and extension, unit price prevails.
B. All applicable taxes are to be paid by the Proposer and included in the quoted price. The College is not exempt from paying State and local transaction privilege tax (sales tax).
   1. Proposals that include equipment or materials should not include sales tax in the amount of your proposal, but do show tax percentage in the appropriate space.
   2. Proposals for services must include any applicable taxes as a separate itemized amount and also show tax percentage in the appropriate space.
C. Provide detailed explanations of any assumptions made in calculating the project costs. Offering firm should specify how implementation costs and other expenses will be billed to the College (e.g., actual expenses (time and materials), flat fee, capped, not-to-exceed, etc.) and when the firm proposes to bill the College for the expenses (e.g., progress payments, milestone, weekly, monthly, etc.).
D. Indicate if the proposal includes work in separate phases. If so, provide separate sections identifying costs for each of the proposed phases and describe the proposed work that would be accomplished in each of the phases.
E. Indicate if any items are optional and specify them in a separate section(s).

7. Proposal Appendix

The Proposal Appendix must include:
A. All documents or forms required by the College to be completed by the firm including the required documents specified in the Appendix of this RFP.
B. A detailed statement of any litigation or regulatory action that has been filed against the offering firm within the last five years. If an action has been filed, state and describe the litigation or regulatory action as filed and identify the court or agency before which the action was instituted, the applicable case or file number and the status or disposition for all such reported actions. If no litigation or regulatory action has been filed, provide a statement to that effect.
C. Audited financial statements for the past five (5) financial years, along with any additional financial detail available to gain a thorough understanding of the statements.
D. If the firm has had any previous contracts canceled or is currently debarred, suspended, or proposed for debarment by any government entity, the current status must be documented in the proposal appendix. The firm agrees to notify the College of any change in this status. If any customer has stopped using the product(s) or service(s) being proposed, offering firm should provide details including customer name, date installed, date usage was discontinued and the reason for discontinuation, including contact details of the customer.
E. If the firm intends to use any cooperative, subcontract, third party agreement, or the like to perform under their proposal, the firm must supply the name, address, qualifications and criteria used by the firm for selection of any third party, and the intended services to be performed. The services provided under the scope of work proposed, in part or in whole, shall not be subcontracted or assigned without prior written permission of the College, except that the contractor may, without prior approval and without being released from any of its responsibilities hereunder, assign the contract to any affiliate or wholly-owned subsidiary of the contractor.

F. Offering firm should provide samples of any documentation or forms that College will be required to execute upon awarding of contract.

G. The offering firm must provide three (3) independent references from three (3) different projects of similar scope, nature, and complexity to that requested by the College. The College prefers educational or governmental entity references. Each of the references must include the entity name; the industry type; complete address; contact name, title, phone number and email address; duration of service to entity; and comments, including current service status.

8. General

A. **Cost of Proposal Preparation** – The College shall not reimburse the cost of developing, presenting or providing any response to this solicitation; offers submitted for consideration should be prepared simply, and economically, providing adequate information in a straightforward and concise manner.

B. **Certification** – By signature on the Proposal Form included herein, the consultant certifies that the submission of the proposal did not involve collusion or other anti-competitive practices. The consultant has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted proposal. In addition, consultant certifies whether or not an employee of the College has, or whose relative has, a substantial interest in any agreement subsequent to this document. Consultant also certifies their status with regard to debarment, or suspension by any governmental entity.

Failure to provide a valid signature affirming the stipulations required by this clause shall result in the rejection of the submitted proposal and, if applicable, any resulting agreement. Signing the certification with a false statement shall void the proposal and, if applicable, any resulting agreement. Any resulting agreement may be subject to legal remedies provided by law. Consultant agrees to promote and offer to the College only those services and/or materials as stated in and allowed for under resulting agreement(s).

C. **Proposal Copies** – The firm must submit one original printed copy of the proposal (clearly marked “Original”) as well as a digital PDF copy.

D. **Proprietary Information** – In the event any offering firm shall include in the proposal any information deemed "proprietary" or "protected," such information shall be separately packaged from the balance of the proposal and clearly marked as to any proprietary claim. The College discourages the submission of such information and undertakes to provide no more than reasonable efforts to protect the proprietary nature of such information. The College, as a public entity, cannot and does not warrant that proprietary information will not be disclosed. The College shall have the right to use any and all information included in the proposals submitted unless the information is expressly restricted by the offering firm.
Section 4
Selection Criteria and Contract Award

Proposals shall be evaluated based on the requirements set forth in the RFP. Selection of the firm(s) will be at the discretion of the College and will be based on the proposal(s) that the College deems to be the most responsive and responsible and in the best interests of the College. It is the intent of the College to award all or any part of this RFP to, and to negotiate and enter into a contract with, the selected firm(s) following a Notice of Intent of Selection.

Selected finalist proposer(s) will be required to make on-site oral and visual presentations or demonstrations at the request of the College. The College will schedule the time and location for any presentations. Costs and equipment for such presentations are the responsibility of the proposer. Best and Final offers may be solicited from the pool of finalists prior to selection of the successful firm.

Proposal submissions will be reviewed by a selection committee and will be evaluated initially based on the following criteria, each of which will be weighted as indicated:

- The offering firm’s experience, background and financial stability as detailed in the “Qualifications” portion of the proposal (20%);
- The offering firm’s ability to meet or exceed service level expectations, technical support requirements and functional area concerns as detailed in the “Response to Scope of Work” portion of the proposal (50%);
- The offering firm’s total financial proposal as detailed in “Attachment B - Cost Proposal” and appropriate supporting financial documentation (20%); and
- The offering firm’s detailed implementation plan and timetable, experience with projects of similar type and magnitude, and familiarity with public sector organizations, notably higher education institutions as detailed in the “Response to Scope of Work” portion of the proposal (10%).

The selection committee will then undertake a second round of deliberations, incorporating the evaluations of the finalist firms on the above criteria with:

- The outcomes of presentations to the committee by the finalists, and
- The results of the reference checks.
## RFP Appendix

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<thead>
<tr>
<th>Attachment</th>
<th>Description</th>
<th>Page</th>
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<tbody>
<tr>
<td>Attachment A</td>
<td>Proposal Form</td>
<td>13</td>
</tr>
<tr>
<td>Attachment B</td>
<td>Cost Proposal</td>
<td>16</td>
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<td>Attachment G</td>
<td>Financial Aid and Student Accounts - Sample Questions</td>
<td>29</td>
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</tbody>
</table>
Attachment A
Proposal Form

Date ________________________________

Proposal of ____________________________________________,

(Name)
a corporation organized and existing under the laws of the State of ______________________; a
partnership consisting of ________________________________________; an individual trading as
_______________________________________________________________.

(Name)

Request for Proposal: ______________________________________________________________________
[provide title or brief description]

To: Pima County Community College District (“College”)

1. In compliance with your Request for Proposal No. __________, the undersigned hereby
offers to furnish the services designated in the RFP, in strict accordance with the RFP, upon written
notice of acceptance of this Proposal at any time within thirty (30) days after the date of opening of the
Proposals, and to execute the Contract in accordance with the Proposal as accepted within five (5) days
after the Contract is presented for signature.

2. The undersigned Proposer hereby acknowledges receipt of the following Addenda, if any:

<table>
<thead>
<tr>
<th>Addendum No.</th>
<th>Date</th>
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3. The undersigned Proposer understands that the College reserves the right to reject any or
all Proposals or to waive any formality or technicality, as determined by the College in its sole discretion,
in any Proposal in the interest of the College.

4. The undersigned Proposer hereby certifies and affirms that this Proposal is genuine and
not a sham or collusive, nor made in the interest or behalf of any person not herein named, and that the
undersigned Proposer has not directly or indirectly induced or solicited any other Proposer to put in a
sham bid, or any other person, firm, or corporation to refrain from bidding, and that the Proposer has not
in any manner sought by collusion to secure for itself an advantage over any other Proposer.

5. The undersigned certifies that to the best of his/her knowledge: (check only one)
There is no officer or employee of Pima Community College who has, or would have, or whose relative has, or would have, a substantial interest in any contract resulting from this request.

The names of any and all public officers or employees of Pima Community College who have, or would have, or whose relative has, or would have, a substantial interest in any contract resulting from this request, and the nature of the substantial interest, are included below or as an attachment to this Proposal.

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

6. The Proposer certifies, to the best of its knowledge and belief, that:

(i) The Proposer and/or any of its Principals or Owners:

(A) (check one) are ( ) or are not ( ) presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any governmental agency.

(B) (check one) have ( ) or have not ( ), within a three year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (federal, state or local) contract or subcontract; violation of federal or state antitrust statutes, rules or regulations relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion; or receiving stolen property; and

(C) (check one) are ( ) or are not ( ) presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any other of the offenses enumerated in paragraph (i)(B) of this provision.

(ii) The Proposer (check one) has ( ) or has not ( ), within a three year period preceding this offer, had one or more contracts terminated for default by any governmental agency.

"Principals," for the purposes of this Proposal, means officers, directors, owners, partners and persons having primary or substantial management or supervisory responsibilities within a business entity.
7. The certifications in paragraphs 4, 5 and 6 of this Proposal are material representations of fact upon which reliance will be placed when making an award. If it is later determined that the Proposer knowingly rendered an erroneous certification, in addition to other remedies available to the College, the College may terminate the contract resulting from this solicitation for default.

(SEAL - If Bidder is a Corporation)

(Official Name of Firm)

(Signature)

(Print Name)

(Title)

(Complete Business Address)

(Email Address)

(Federal Taxpayer ID Number)
Attachment B
Cost Proposal

Offering firms should provide the following costs for project implementation (to include planning and service design, training, etc.), ongoing Tier 1 call center support (per call, per minute, etc.) and all other costs such as software licensing, ADA/Spanish speaking services, etc. Sufficient additional detail should be provided for the evaluation committee to clearly identify sources of all costs and expenses. Any costs and expenses not clearly identified as part of the proposal will not be considered at a later date. Prospective vendors should provide complete costing for the IT Help Desk component, the Student Financial Services component, or both. Optional costs should be clearly identified as such separately.

<table>
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<th>Year 2</th>
<th>Year 3</th>
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<td>Implementation and Training</td>
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<td>Ongoing Call Support</td>
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<td>All Other Charges</td>
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<td><strong>Sub Total</strong></td>
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Page 16 of 32
AGREEMENT BETWEEN PIMA COUNTY COMMUNITY COLLEGE DISTRICT

AND

(insert vendor/consultant name)

This Agreement made and entered into on the _____ day of ___________, 20_____, by and between
Pima County Community College District (hereinafter referred to as "District" or "College") and
______________ (hereinafter referred to as the "Consultant").

The District and the Consultant agree as follows:

FIRST:  The Consultant agrees to perform the professional, technical and/or management services hereinafter set forth when, and as assigned by the District, and

SECOND:  The District agrees to pay the consultant a fee, together with such other payments and reimbursements as are hereinafter provided.

ARTICLE 1: CONSULTANT'S SERVICES
The Consultant agrees to provide professional services and consultation to assist the District in __________________________________________________________________ as outlined in the scope of work covered in Attachment A of this Agreement which is hereby referenced and incorporated as an integral part of this Agreement.  All work performed under the Agreement must have prior approval of the District.

ARTICLE 2: FEE STRUCTURE
The fee structure for the work conducted under this Agreement will be in accordance with Attachment B of this Agreement which is hereby referenced and incorporated as an integral part of this Agreement.

ARTICLE 3: METHOD OF PAYMENT
Payments to the Consultant will be made monthly upon the presentation and approval of the Consultant's invoice.  Each such invoice shall be documented in such detail and demonstrate such progress on each portion of the work as the District may reasonably require.

ARTICLE 4: INDEMNIFICATION
To the fullest extent permitted by law, the Consultant shall defend, indemnify and hold harmless the District, its agents, representatives, officers, directors, officials and employees, from and against all claims, damages, losses and expenses (including, but not limited to, attorneys’ fees, court costs and the cost of appellate proceedings) relating to, arising out of, or alleged to have resulted from the acts, errors, mistakes, omissions, work or services of the Consultant, its employees, agents or any tier of subcontractors in the performance of the Agreement.  Consultant's duty to defend, hold harmless and
indemnify the District, its agents, representatives, officers, directors, officials and employees, shall arise in connection with any claim, damage, loss or expense that is attributable to bodily injury, sickness, disease, death or injury to, impairment or destruction of property, including loss of use resulting therefrom, caused by any acts, errors, mistakes, omissions, work or services in the performance of the Agreement, including any employee of the Consultant or any tier of subcontractor or any other person for whose acts, errors, mistakes, omissions, work or services the Consultant be legally liable.

ARTICLE 5: EMPLOYEE RELATIONSHIP
The Consultant is an independent contractor and is not an employee, partner, legal representative, joint venturer or agent of the District. The District is not an employee, partner, legal representative, joint venturer or agent of the Consultant.

ARTICLE 6: CANCELLATION
This Agreement may be cancelled at any time, with or without cause, by the District giving ninety (90) days written notice to the Consultant. In the event of such cancellation, the Consultant shall be paid for authorized services provided prior to the effective date of termination. In ascertaining the services actually rendered hereunder up to the date of the termination of this Agreement, consideration shall be given to both completed work and work in process of completion and to complete and incomplete reports and other documents whether delivered to the District or in the possession of the Consultant.

ARTICLE 7: OWNERSHIP OF DRAWINGS OR REPORTS
Services as represented on drawings, reports, memoranda, notes and drafts are the property of the District whether the work is completed or not and may be used by them in any fashion they see fit. Notwithstanding the foregoing, however, the Consultant reserves the right to use any studies, analyses or data prepared or collected during the course of this work for other purposes as seen fit, provided, however, that no such use shall allow the District to be identified without the consent of the District.

ARTICLE 8: PERSONAL SERVICES
It is agreed that the District is relying on the personal services of the Consultant and upon their technical ability and professional integrity. Such reliance is one of the chief considerations for the execution of this Agreement by the District. It is further understood and agreed that the Consultant shall not assign, sublet nor transfer his duties under this Agreement, nor shall this Agreement be assignable or transferable by operation of law or otherwise without the written consent of the District.

ARTICLE 9: CONFLICT OF INTEREST
The Consultant agrees to perform services exclusively for the District under this agreement, and expressly agrees not to undertake any conflicting duties to others, with or without compensation, which could in any way compromise that responsibility. The Consultant shall not disclose to others any confidential information gained from this relationship without the prior, written permission from the District, and the Consultant shall not seek to use their position, the information gained thereby, nor any other aspect of the project or relationship with others involved in it, for personal gain or other remuneration or benefit, beyond the compensation provided for herein.

ARTICLE 10: TERM OF AGREEMENT
The initial term of the contract shall be from December 1, 2012 thru November 30, 2015. Two(2), one year contract extensions may be implemented only by written amendment to this Agreement approved by both parties.
ARTICLE 11: GOVERNING LAW
This Agreement is made in the State of Arizona and shall be subject to and governed by the laws of the State of Arizona. All questions concerning the validity, construction and administration of the Agreement shall be determined under Arizona law.

ARTICLE 12: SEVERABILITY
This Agreement shall be severable and to the extent that any part of the Agreement is unenforceable for any reason whatsoever, the remaining parts of this Agreement shall remain in full force and effect.

ARTICLE 13: NOTICES
All notices to either party shall be deemed to have been provided by depositing the same, postage prepaid, with the United States Postal Service, addressed as follows:

District Representative: TBD

Consultant Representative: TBD

ARTICLE 14: ARBITRATION
If the parties are unable to resolve any disputes arising under the Agreement, those disputes shall be resolved through arbitration in accordance with A.R.S. ’12-1501, et. seq.

ARTICLE 15: NON-DISCRIMINATION
The parties agree to comply with Arizona law prohibiting discrimination in employment by government contractors, to the extent applicable with this Agreement, along with other applicable non-discrimination laws and regulations.

ARTICLE 16: LACK OF SUFFICIENT FUNDING
This Agreement may be cancelled without any further obligation on the part of the College in the event that sufficient appropriated funding is unavailable to assure full performance of the Agreement terms. Consultant shall be notified in writing of any such non-appropriation at the earliest opportunity.

ARTICLE 17: INSURANCE
Consultant shall furnish insurance as required by Attachment D hereto, which is incorporated herein by this reference as though fully set forth herein.

ARTICLE 18. ADDITIONAL TERMS AND CONDITIONS
The parties shall comply with the Terms and Conditions attached hereto as Attachment E, which are incorporated herein by this reference as though fully set forth herein.

IN WITNESS WHEREOF, the Parties to this agreement have hereunto caused the same to be executed at Tucson, Arizona the day and year first above written.

Pima County Community College District: Consultant:

By: ____________________________ By: ____________________________

Title: ____________________________ Title: ____________________________
Attachment D

Insurance Requirements

1. Insurance Requirements

The Consultant, at Consultant's own expense, shall purchase and maintain the herein stipulated minimum insurance with companies duly licensed to do business in the State of Arizona with policies and forms satisfactory to the College and possessing a current A.M. Best, Inc. Rating of B++6.

All insurance required herein shall be maintained in full force and effect until all work required to be performed under the terms of the agreement is satisfactorily completed and formally accepted; failure to do so may, at the sole direction of the College, constitute a material breach of the agreement.

The Consultant's insurance shall be primary insurance, and any insurance or self-insurance maintained by the College shall not contribute to it.

Any failure to comply with the claim reporting provisions of the policies or any breach of an insurance policy warranty shall not affect coverage afforded under the policy to protect the College.

All policies, except Workers’ Compensation, shall contain a waiver of transfer rights of recovery (subrogation) against the College, its agents, representatives, directors, officers, and employees for any claims arising out of the Consultant's work or service.

The insurance policies may provide coverage which contains deductibles or self-insured retentions. Such deductible and/or self-insured retentions shall not be applicable with respect to the coverage provided to the College under such policies. The Consultant shall be solely responsible for deductible and/or self-insured retention and the College, at its option, may require the Consultant to secure the payment of such deductible or self-insured retentions by a surety bond or an irrevocable and unconditional letter of credit.

The College reserves the right to request and to receive, within 10 working days, certified copies of any or all of the herein required insurance policies and/or endorsements. The College shall not be obligated, however, to review same or to advise Consultant of any deficiencies in such policies and endorsements, and such receipt shall not relieve Consultant from, or be deemed a waiver of the College’s right to insist on, strict fulfillment of Consultant’s obligations under the agreement.

The insurance policies, except Workers’ Compensation, required by the agreement shall name the College, its agents, representatives, officers, directors, officials, and employees as Additional Insureds.

General Liability

Consultant shall maintain Commercial General Liability insurance with a limit of not less than $2,000,000 for each occurrence with a $2,000,000 Products and Completed Operations Aggregate and $2,000,000 General Aggregate Limit. The policies shall include coverage for
bodily injury, broad form property damage, personal injury, products/completed operations and blanket contractual coverage including, but not limited to, the liability assumed under the indemnification provisions of the agreement, which coverage will be at least as broad as Insurance Service Office, Inc. Policy Form CG 000211093 or any replacement thereof. The coverage shall not exclude X, C, U.

Policies shall contain a severability of interest provision, and shall not contain a sunset provision or commutation clause, or any provision that would serve to limit third party action over claims.

The Commercial General Liability additional insured endorsement shall be at least as broad as the Insurance Service Office, Inc's, Additional Insured, Form B CG20101185, and shall include coverage for Consultant’s operations and products and completed operations.

Certificates of Insurance

Prior to commencing Services under the agreement, Consultant shall furnish the College with Certificates of Insurance, or formal endorsements as required by the agreement, issued by Consultant’s insurer(s), as evidence that policies providing the required coverages, conditions and limits required by the agreement are in full force and effect.

In the event any insurance policy(ies) required by the agreement is(are) written on a “claims made” basis, coverage shall extend for two years past completion and acceptance of the Consultant’s work or services and as evidenced by annual Certificates of Insurance.

If a policy does expire during the life of the agreement, a renewal certificate must be sent to the College thirty (30) days prior to the expiration date.

All Certificates of Insurance required by the agreement shall be identified with a bid serial number and title.

Cancellation and Expiration Notice

Insurance evidenced by these certificates shall not expire, be canceled, or materially changed without thirty (30) days prior written notice to the College.

Professional Liability

Consultant shall maintain professional liability insurance with minimum limits of $1,000,000 per occurrence and required notice to the College at least thirty (30) days prior to cancellation or restriction of coverage. Coverage shall be afforded on a form acceptable to the College. Consultant shall maintain such professional liability insurance until at least three (3) years after completion of all services required under this agreement.
Workers’ Compensation

This Consultant shall carry Workers’ Compensation insurance to cover obligations imposed by federal and state statutes having jurisdiction of Consultant’s employees engaged in the performance of the work; and, Employer’s Liability insurance of not less than $2,000,000 for each accident, $1,000,000 disease for each employee, and $1,000,000 disease policy limit.

In case any work is subcontracted, the Consultant will require the Subcontractor to provide Workers’ Compensation and Employer’s Liability to at least the same extent as that required of the Consultant.
Attachment E

Additional Agreement Terms and Conditions

The following additional terms and conditions are to be incorporated into the final Agreement between the College and the Consultant, the form of which is attached hereto as Attachment C:

1. Legal Remedies – All claims and controversies shall be subject to the Pima County Community College Policy regarding Formal Protests and Appeals.

2. Agreement – The Agreement shall contain the entire agreement between the College and the Consultant relating to this requirement and shall prevail over any and all previous agreements, contracts, proposals, negotiations, purchase orders or master agreement in any form.

3. Agreement Amendments – The Agreement shall be modified only by a written amendment signed by persons duly authorized to enter into agreements on behalf of the College and the Consultant.

4. Provisions Required by Law – Each and every provision of law and any clause required by law to be in the Agreement shall be read and enforced as though it were included herein, and if through mistake or otherwise any such provision is not inserted, or is not correctly inserted, then upon the application of either party the Agreement shall forthwith be physically amended to make such insertion or correction.

5. Severability – The provisions of the Agreement are severable to the extent that any provision or application held to be invalid shall not affect any other provision or application of the Agreement which may remain in effect without the invalid provision or application.

6. Records – Pursuant to provisions of title 35, chapter 1, article 6 A.R.S. §35-215 the Consultant shall retain, and shall contractually require each subcontractor to retain, all books, accounts, reports, files and other records relating to the acquisition and performance of the Agreement for a period of five (5) years after the completion of the Agreement. All such documents shall be subject to inspection and audit at reasonable times. Upon request, a legible copy of any or all such documents shall be produced at the offices of the Auditor General, the Attorney General or the College Purchasing Office.

7. Advertising – Contractor shall not advertise or publish information concerning the Agreement, without prior written consent of the College.

8. Preparation of Specifications by Persons Other than College Personnel – All specifications shall seek to promote overall economy for the purposes intended and encourage competition and not be unduly restrictive in satisfying the College’s needs. No person preparing specifications shall receive any direct or indirect benefit from the utilization of specifications, other than fees paid for the preparation of specifications.

9. Americans With Disabilities Act – The Consultant shall comply with all applicable provisions of the Americans with Disabilities Act (ADA) and applicable federal regulations under the Act.
10. **Conflict of Interest** – The College may, within three years after its execution, cancel the agreement without penalty or further obligation if any person significantly involved in negotiating, drafting, securing or obtaining the agreement for or on behalf of the College becomes an employee of or a consultant in any capacity to any other party to the agreement with reference to the subject matter of the Agreement while the Agreement or any extension thereof is in effect or as otherwise provided by A.R.S. § 38-511.

11. **Drug Free Workplace** – The Consultant agrees that in the performance of the Agreement, neither the Consultant nor any employee of the Consultant shall engage in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance in conducting any activity covered in the Agreement. The College reserves the right to request a copy of the Consultant Drug Free Workplace Policy. The Consultant further agrees to insert a provision similar to this statement in all subcontracts for services required.

12. **Equal Opportunity** – The provisions of Section 202 of Executive Order 11246.41 C.F.R. Sec. -0-1.4.41 Sec. 60-250.4 and 41 C.F.R. Sec. 60-741.4 are incorporated herein by reference and shall be applicable to the Agreement unless the Agreement is exempted under the rules, regulations or orders of the U.S. Secretary of Labor.

13. **Federal, State and Local Taxes, Licenses and Permits** – Consultant is solely responsible for complying with all laws, ordinances, and regulations on taxes, registrations, licenses and permits, as they may apply to any matter under this document. The Consultant must demonstrate that they are duly licensed by whatever regulatory body may so require during the performance of the Agreement. Prior to the commencement of Agreement, the Consultant shall be prepared to provide evidence of such licensing as may be requested by the College. Consultant shall, at no expense to the College, procure and keep in force during the entire period of the Agreement all such permits and licenses.

14. **Gratuities** – The College may, by written notice to the Consultant, cancel the agreement if it is found by the College that gratuities, in the form of entertainment, gifts or otherwise were offered or given by the Consultant or any agent or representative of the contractor, to any officer or employee of the College with a view toward securing an agreement or securing favorable treatment with respect to the performing of such agreement.

15. **Liens** – Each Consultant shall keep the College free and clear from all liens asserted by any person or entity for any reason arising out of the furnishing of services or materials by or to the Consultant.

16. **Sales and Use Tax** – The College is not exempt from state sales and use tax.

17. **Sexual Harassment** – Federal law and the policies of the College prohibit sexual harassment of College employees or students. Sexual harassment includes any unwelcome sexual advance toward a College employee or student, any request for a sexual favor from a College employee or student, or any other verbal or physical conduct of a sexual nature that is so pervasive as to create a hostile or offensive working environment for College employees or students. Consultant, subcontractors and suppliers for this project are required to exercise control over their employees so as to prohibit acts of sexual harassment of College employees and students. The employer of any person whom the College, in its reasonable judgment, determines has committed an act of sexual harassment agrees as a term and condition of the Agreement to cause such person to be
removed from the project site and from College premises and to take such other action as may be reasonably necessary to cause the sexual harassment to cease.

18. Smoking – All facilities of the College are smoke free. Smoking is not permitted inside College buildings or within 25 feet of doorways and air intakes. The Consultant is required to comply with this smoke free policy.

19. Confidentiality – The parties shall comply with 20 USC Section 1232(g), the Buckley Amendment to the Family Educational Right and Privacy Act of 1974. Therefore, Contractor shall not be entitled to receive Employee or Student information directly from the College, other than public information available in any College directory which is not protected by federal or state privacy or confidentiality statutes or regulations or requirements necessitated by the nature of this specific contract. Contractor may solicit Employee and Student information directly from Employees and Students subject to prior disclosures by Contractor of all intended uses of such information. Regardless of the Employee or Student personal information, even if such information is publicly available via directories, Contractor shall under no circumstances sell, duplicate, market, or give to any person or persons, entities or other companies a list or other personal information of any or all Employees or Students. All Employee and Student identities and personal information shall remain confidential. Disclosure by Contractor occurring without the express prior written consent of the Employee or Student shall result in the immediate termination of this agreement.

20. Assignment-Delegation – No right or interest in the Agreement shall be assigned or delegated by Consultant without the prior written permission of the College. Any attempted assignment or delegation by Consultant shall be wholly void and totally ineffective for all purposes unless made in conformity with this paragraph.

21. Force Majeure – Neither party shall be liable in damages or have the right to terminate this Agreement for any delay or default in performing under the Agreement if such delay or default is caused by conditions beyond its reasonable control including, but not limited to wars, insurrections, fires, floods, governmental restrictions and/or any other cause beyond the reasonable control of the party whose performance is affected.

22. Intellectual Property Rights – It is understood and agreed that ownership of intellectual property developed as a result of fulfilling the requirements of this Agreement belongs solely and exclusively to the College. Documents provided in connection with the Agreement belong to the College and are being used with permission. Intellectual property, as used herein, means all forms of legally protectable intellectual property, including copyrights, trademarks, inventions, patent applications, patents and mask works, drawings and/or blueprints. It is also understood and agreed that any intellectual property created as a result of Consultant’s performance of this Agreement is considered a work for hire under the U.S. copyright laws and as such, the College will own the copyright.

23. Laws and Regulations – Consultants are solely responsible for keeping themselves fully informed of and faithfully observing all laws, ordinances, and regulations affecting the rights of their employees, and shall protect and indemnify the College, its officers and agents against any claims of liability arising from or based on any violation thereof.
24. **Payment Terms** – Payments by the College shall be subject to the provision of Title 35 of Arizona Revised Statutes, relating to time and manner of submission of claims. The College’s obligation is payable only and solely from funds appropriated for the purpose of the Agreement. Unless otherwise stated herein, the payment terms for the Agreement are Net 30 days.

25. **Price Adjustment** – Price changes will normally only be considered at the end of one Agreement period and the beginning of another. Price change requests shall be in writing, submitted at least sixty (60) days prior to the end of the current Agreement period, and shall be supported by written evidence of increased costs to the Consultant. The College will not approve unsupported price increases that will merely increase the gross profitability of Consultant at the expense of the College. Price change requests shall be a factor in the Agreement extension review process. The College shall, in its sole opinion, determine whether the requested price increase or an alternate option is in the best interest of the College.

26. **Prior Course of Dealings** – No trade usage, prior course of dealing or course of performance under other agreements shall be a part of this Agreement resulting from this RFP, nor shall such trade usage, prior course of dealing or course of performance be used in the interpretation or construction of such resulting agreement.

27. **Right to Offset** – The College shall be entitled to offset against any sums due the Consultant, any expenses or costs incurred by the College, or damages assessed by the College concerning the Consultant's non-conforming performance or failure to perform the Agreement, or any other debt owing the College.

28. **Insolvency** – The College shall have the right to terminate the Agreement at any time in the event Consultant files a petition in bankruptcy; or is adjudicated bankrupt; or if a petition in bankruptcy is filed against Consultant and not discharged within thirty (30) days; or if Consultant becomes insolvent or makes an assignment for the benefit of its creditors or an arrangement pursuant to any bankruptcy law; or if a receiver is appointed for Consultant or its business.

29. **Lack of Funding** – The Agreement may be canceled without further obligation on the part of the College in the event that sufficient appropriated funding is unavailable to assure full performance of the terms. The Consultant shall be notified in writing of such non-appropriation as soon as reasonably possible. No penalty shall accrue to the College in the event this cancellation provision is exercised. This cancellation provision shall not be construed so as to permit the College to terminate the Agreement in order to acquire similar equipment, material, supplies or services from another party.

30. **Stop Work Order** – The College may at any time, by written order to the Consultant, require the Consultant to stop all or any part of the work called for by the Agreement for a period of up to ninety (90) days after the order is delivered to the Consultant, and for any further period to which the parties may agree. The order shall be specifically identified as the Stop Work Order issued under this provision. Upon receipt of the order, the Consultant shall immediately comply with its terms and take all reasonable steps to minimize the incidence of costs allocable to the work covered by the order during the period of work stoppage. If a Stop Work Order issued under this provision is canceled or the period of the order or any extension expires, the Consultant shall resume work. The College shall make an equitable adjustment in the delivery schedule or Agreement price, or both, and the Agreement shall be amended in writing accordingly.
31. **Suspension or Debarment** – The College may by written notice to the Consultant immediately terminate the Agreement if the College determines that the Consultant has been debarred, suspended, or otherwise lawfully prohibited from participating in any public procurement activity, including but not limited to, being disapproved as a subcontractor or Contractor of any public procurement unit or other governmental body.

32. **Continuation of Performance Through Termination** – The Consultant shall continue to perform, in accordance with the requirements of Agreement, up to the date of termination, as directed in the termination notice.

33. **Sudan, or Iran Scrutinized Business** – Pursuant to A.R.S. #35-391.06(A) AND 35-393.06(B), Contractor certifies that it does not have a “scrutinized” business operation in either Sudan or Iran, as that term is defined in A.R.S. #35-391(15) AND 35-393(12) respectively.

34. **Federal Immigration Laws and Regulations** – Consultant warrants that it complies with all Federal Immigration laws and regulations that relate to its employees and complies with A.R.S. § 23-214(a) and that it requires the same compliance of all subcontractors under the agreement. Consultant acknowledges that pursuant to A.R.S. § 41-4401 and effective September 30, 2008, a breach of this warranty is a material breach of the agreement subject to penalties up to and including termination of the agreement. The College retains the legal right to audit the records of the Consultant and inspect the papers of any employee who works for the Consultant to ensure compliance with this warranty and the Consultant shall assist in any such audit. The Consultant shall include the requirements of this paragraph in each contract with subcontractors under the agreement.

If the Consultant or subcontractor warrants that it has complied with the employment verification provisions prescribed by sections 274(a) and 274(b) of the Federal Immigration and Nationality Act and the E-verify requirements prescribed by A.R.S. § 23-214(A), The Consultant or subcontractor shall be deemed to be in compliance with this provision. The College may request proof of such compliance at any time during the term of the Agreement by the Consultant and any subcontractor.

35. **Extended Contract**
   The College is an active member of the Strategic Alliance for Volume Expenditures (S.A.V.E.) Cooperative. Under this Cooperative Purchasing Agreement, and with the concurrence of the successful Proposer, other members of this organization may access any subsequent agreement/contract resulting from this solicitation. If the Proposer does not want to grant such access, it must be stated in their Proposal. In the absence of a statement to the contrary, the college will assume that access is granted by the Proposer to any subsequent agreement/contract.
Attachment F
RFP Completion Checklist

This checklist is a summary of some of the required components of this RFP – see Section 3 for more detailed information on these requirements. This checklist is provided as a convenience to offering firms, but is not intended to be all-inclusive or to imply acceptance or evidence of compliance by its use. It is the responsibility of the contractor to submit complete and compliant proposals.

☐ Cover Letter
☐ Proposal Form
☐ Qualifications
☐ Response to Scope of Work
☐ Exceptions Requested
☐ Cost Proposal
☐ Appendix
Sample Student Financial Services Questions

This listing of questions represents a sampling of the types of concerns, questions and issues that the call center might field for the various functional areas covered by this RFP. It is provided here as an indication of the general types of calls that are received on an ongoing basis and is not to be considered all inclusive.

1. Financial Aid

Once trained, representatives of the successful vendor should be able to respond with a correct answer to all of the following questions regarding Financial Aid. The successful vendor will also be required to submit a plan of action for how the more detailed and in-depth questions will be transferred to Pima personnel for final resolution.

- What is financial aid?
- I want to go to school, how do I apply for financial aid?
- What information do I need to apply for financial aid?
- What is the deadline to apply for financial aid?
- How often does the FAFSA need to be completed?
- I applied for financial aid, how will I know if I am eligible?
- What is “expected family contribution (EFC)”?
- How does the EFC affect my financial aid?
- How much financial aid could I get?
- Where can I check the status of my financial aid application?
- FAFSA denied me, can I get a student loan?
- What does Verification mean?
- Why do you need my tax information?
- Why do you need my parent’s information, they don’t support me? I live on my own.
- How much financial aid can I get at Pima?
- I am from out of state, how much more financial aid can I get for that?
- Where can I find information about my financial aid on MyPima account?
- What does the red flag/green check mean?
- Why can’t I receive the full amount of aid that I am eligible for?
- What does my budget have to do with how much aid I can get?
- What does the Cost of Attendance (COA) mean?
- Is the COA how much it is going to cost me to go to school?
- How soon can I expect to receive my financial aid check?
- I signed my MPN and completed the Loan Entrance Counseling, when will I get my loan money?
- Do I need to enroll in classes to get my loan money?
- What scholarships do you have available?
- Why didn’t I get the FSEOG/LEAP/Perkins like my friend?
- My friend & I have the exact same living situations; why did s/he get more financial aid than I?
- My friend got her financial aid a long time ago, how come I still haven’t gotten mine?
• Will my financial aid be affected if I have to change my schedule?
• I am not able to complete my enrollment, how will that affect my financial aid?
• What is the difference between a “drop” and a “withdrawal”?
• Why did you pull back some of my financial aid?
• Why do I still have an outstanding balance due if I got financial aid?
• There is a negative amount on my account, do I owe that?
• I am a responsible good student, why am I no longer eligible for financial aid?
• The Federal government said I am eligible for financial aid, why does Pima say I’m not?
• I support my live-in companion, plus additional family members, why can’t I count them on my FAFSA?
• I pay child support and contribute more than 50% of their support, why can I only count one of the situations on my FAFSA?
• Why do you need to know about my checking and savings/investments/business?
• How do you calculate “net worth” of investments/business assets?
• The IRS accepted my tax return, why are you saying it is wrong?
• Why do I need to turn in an appeal?
• What does 67% completion mean?
• What does timeframe mean?
• When do I have to turn in my appeal?
  - Why was I denied?
  - What do I do if it’s denied?
  - Can I re-appeal? I was denied.
  - What does probation mean?
  - What does warning mean?
• What happens if I receive all “Fs” and/or all “Ws” or both? What if I drop all of my courses?
• Why won’t I get money on a course I have taken before?
• What is the Financial Aid Freeze date? What happens?

2. Financial Aid/Student Accounts

Once trained, the successful vendor should be able to respond with a correct answer to all of the following questions regarding both Financial Aid and Student Accounts. The successful vendor will also be required to submit a plan of action for how the more detailed and in-depth questions will be transferred to Pima personnel for final resolution. The questions in this section are indicative of the 40-50% of questions that might be initiated in one area but ultimately be resolved in the other.

• Why isn’t my Financial Aid showing on my student account?
• When will my Financial Aid Refund be available?
• My Financial Aid is showing as “memoed” on my account? When will I get my refund?
• My Financial Aid is showing on my account? Is my check ready?
• I received a refund amount that does not make sense.
• Why do I have a Financial Aid hold on my account?
• How do I return my financial aid check?
3. **Student Accounts**

Once trained, representatives of the successful vendor should be able to respond with a correct answer to all of the following questions regarding Student Accounts. The successful vendor will also be required to submit a plan of action for how the more detailed and in-depth questions will be transferred to Pima personnel for final resolution.

- How much do I owe?
- How do I pay for my classes?
- When is the latest I can pay for my classes?
- Why was I dropped from my classes?
- Why is there a Financial Hold on my Account?
- Can I pick up my Financial Aid check?
- How do I set up e-refund?
- How do I set up a Payment Plan?
- I want to add a class; can I update my payment plan?
- Can I put books on my payment plan?
- I did not use my entire book loan. When will I get a refund?
- My check did not come in the mail, how do I get it replaced?
- My Child/Spouse is a Student at Pima. Can I get information regarding what they owe?
- When I enter my credit card number in the payment plan I get an error message.
- If I drop a class, or the class was cancelled, will I get a refund?

4. **IT Helpdesk**

Once trained, representatives of the successful vendor should be able to respond with a correct answer to all of the following questions regarding the IT Helpdesk. The successful vendor will also be required to submit a plan of action for how the more detailed and in-depth questions will be transferred to Pima personnel for final resolution.

**Potential Student Questions**

- What is my password?
- I can’t get my password to work.
- How do I log into the system?
- How do I drop/add a class?
- Can I pay my fees on-line?
- I can’t access my class and I just registered, why?
- No matter what I do, I cannot log into your system.
- What is my username/password?
- How can I reset my password?
- I tried to sign up for a course but the system won’t let me proceed.
- Can I pay for my classes later, in person?
- I can’t get the screens to print legibly.
- I can’t locate XYZ Course.
- I called yesterday but no one has solved my problems yet.
- Why is the system so slow?
- My name changed, how do I get this changed in your system?
- How can I reach my instructor?
- I received a “server unavailable” error.
- Where do I find information regarding specific requirements for a degree?
- I can’t log into D2L?
- How do I know if I have been admitted?
- I keep getting messages about pop-ups.
- I keep getting “Internal Server Error”.
- The system won’t accept the password that I selected.
- The system keeps saying that my connection has expired.
- What is an employee/student ID?
- My instructor has not responded to my messages. Who should I contact?
- In MyPima, the calendar and groups windows close very quickly after being opened.

Potential Faculty Questions
- I can’t find my class roster? Why doesn’t it show up on the portal?
- How do I drop students from my class?
- I can’t seem to navigate to _____?
- How do I grade my classes on line?
- I submitted an incorrect grade on-line, what do I do to fix it?
- I withdrew a student on the portal. How do I reinstate the student?
- Where do I navigate to see a student’s test scores?
- Where do I find a student’s transcript or transfer credit?
- Where do I find the wait list for my class?
- I need access to _____ and I can’t find it in the system.
- Can you tell when a student dropped from (registered for, was graded in, etc.) this course?
- I’m a new employee/faculty member? How do I get access to the system?
- I am an adjunct faculty member but cannot activate my account.