

**REQUEST FOR QUALIFICATIONS AND PROPOSALS – ELECTRONIC CATALOG MANAGEMENT
SOFTWARE SERVICES: IRVINE VALLEY COLLEGE**

South Orange County Community College District (SOCCCD) is inviting submittals from qualified firms, partnerships, corporations, associations, or professional organizations to provide Electronic Catalog Management Software Services for Irvine Valley College and Saddleback College. Selection will result in an Agreement expected to provide comprehensive professional services to SOCCCD beginning September 30, 2014.

If you would like to submit a response to this Request for Qualifications and Proposals, please send seven (7) hard copies and one (1) electronic copy of requested materials to:

**South Orange County Community College District
Facilities Planning & Purchasing
Health Sciences Building
28000 Marguerite Parkway
Mission Viejo, CA 92692
Attn: Shannon Seifert**

Questions regarding this RFQ & P may be directed to Shannon Seifert, Purchasing Manager or via email at sseifert@socccd.edu. Firms/Individuals (Firm) must confirm an interest in providing a submittal by emailing Shannon Seifert by the date identified in the RFQ & P schedule.

The District may modify the RFQ & P prior to the deadline for submittals by issuance of an electronic addendum on the district bid website at www.socccd.edu.

All responses must be received by mail, recognized carrier or hand delivered by

July 11, 2014, 2:00 P.M.

6-16-2014

INTRODUCTION

Irvine Valley College and Saddleback College seek to procure an electronic catalog management software system that utilizes the following functions: manage the entire catalog process online; integrate with our SIS; flag inconsistencies and generate aggregate reports for the catalog; manage the work flow processes for everyone involved; track edits and track status; archive copies of previous versions; publish to web, mobile, tablet and print easily; generate PDF files; automatically create an index and table of contents for web, mobile and print; integration with department websites; and authenticate using existing username and password credentials; technical support and training that allows you to work with the same people consistently. The evaluation timeframe is expected to be 12 weeks. The selected team will work with the District Technology Committee, take an active leadership role in the entire process, make presentations to the Board of Trustees if required, and prepare the final submittal/services.

The District is requesting qualification statements and proposals from consultants with a proven track record. At a minimum, the proposal will provide the number of years similar services have been provided and five client references, including at least one California college or universities and a minimum of one Southern California community college.

It is the intent of this Request for Qualifications and Proposals (RFQ & P) to establish the specifications, terms and conditions governing the selection process.

BACKGROUND:

The District consists of two colleges and a developing campus: Saddleback College, Irvine Valley College and the Advanced Technology and Education Park (ATEP).

Saddleback College, located in Mission Viejo, celebrated its 40th anniversary on September 23, 2008. Saddleback College is approximately 175 acres and serves over 39,000 students each year.

Irvine Valley College, located in Irvine, was founded in 1979 as Saddleback College North Campus and established as Irvine Valley College July 1, 1985. Irvine Valley College is approximately 100 acres and serves over 14,000 students each year.

This joint effort between the colleges replaces an older paper-based process for accumulating college catalog data with modern, comprehensive and integrated online catalog management software. It is anticipated that more than 50% of student populations will access all information via the internet.

SUBMITTAL INFORMATION AND SUBMITTAL SCHEDULE

All submittals shall be in the form and formatted as specified in this RFQ & P. Submittals which do not include all of the elements as specified, or which deviate from the proposed format and content as specified, may be deemed "non-responsive" by the evaluation committee and eliminated from further consideration.

Request for Qualifications and Proposals
Electronic Catalog Management Services
Irvine Valley College and Saddleback College

6-16-2014

Time is of the essence. Submitting Firms will be expected to adhere to the required dates and times. The RFQ & P process must adhere to this timeline in order to implement the e-catalog for the 2015-16 academic year.

Submittal questions must be in writing and be directed to Shannon Seifert via email at sseifert@socccd.edu with the subject line indicating "Question(s) for Electronic Catalog Management Software Services RFQ & P". If questions are submitted after the deadline, they will not be answered and firms must provide a submittal using the information in the RFQ & P and any addenda provided.

Request for Qualification & Proposals Submittal Schedule

RFQ & P - 1 st Advertisement	June 16, 2014
RFQ & P - 2 nd Advertisement	June 23, 2014
Deadline email confirmation of interest	June 25, 2014
Deadline for written questions	July 1, 2014
Last addendum	July 7, 2014
Deadline for RFQ & P Submittal	July 11, 2014
Interviews	July 28, 2014
Contract Negotiation	August 5, 2014
Board Meeting Date	September 29, 2014
Contract Execution	September 30, 2014

During the review of the submittals, SOCCCD will not report apparent errors or request submittal clarification. Submittals will be interpreted as presented. Firms are responsible to proof documents to avoid errors.

The delivery package must be clearly marked with the RFQ & P title, Firm's name and address, contact name, email and phone number.

Submittals may be withdrawn at any time before the deadline by written request of person signing the Certification.

Late submittals will be returned to the firm without evaluation and firm will not qualify for consideration. It is the firm's responsibility to ensure submittals are received on or before the deadline and at the identified location. A postmark will not be accepted as meeting the delivery requirement. Third party carriers are routed through the warehouse and may experience delay from carriers stated delivery timeframe. Hand delivery should include time allowances for limited parking, the possibility of elevator failure (third floor delivery) or other potential obstacles to reaching the delivery location in a timely manner.

SCOPE OF WORK

6-16-2014

Overview

The existing printed catalog is insufficient to meet future needs resulting in student success. It does not integrate across multiple platforms such as the college website, social media, custom forms, etc. Irvine Valley College and Saddleback College are seeking to digitize the college catalog process eliminating reliance on paper catalogs and improving productivity, efficiency, and transparency. The interactive platform will streamline the process to create, organize, edit, and archive course data by seamlessly integrating with the existing student information system. In addition, the software is expected to provide the opportunity to print professional-quality catalogs on demand for students and staff still wishing to generate a hard copy. Automated workflow processes are expected to manage who participates in content creation and approvals with each step tracked and documented.

Services:

1. Complete implementation within an 18 week duration.
 - a. Kick off meeting
 - i. Overview of implementation
 - ii. Roles and Responsibilities, Present dedicated team manager
 - iii. Define expectations
 - iv. Present conclusions drawn during proposal submittal process and implications
 - v. Provide recommendations
2. The Electronic Catalog Management Software services are expected to provide the following:
 - a. Manage the entire catalog process online
 - b. Improved services for students, faculty, staff and public through a cross-platform interface
 - c. Access to important resources 24/7
 - d. Improved search features and accuracy of data within the information flow
 - e. Provide index and/or table of contents
 - f. Integrate with web, mobile tablet and print functionalities (including responsive design capabilities)
 - g. Workflow management including track edits and track status
 - h. Integrate with department websites
 - i. Authenticate existing username and password credentials
 - j. Archived copies of previous versions
 - k. Provide ongoing technical support from assigned client services representative
 - l. Provide both initial and refresh training allowing interface with same dedicated client services representative consistently via both email and telephone.
 - m. Ongoing upgrades

Schedule. The Electronic Catalog Management Software Services are expected to begin upon Board approval at the September Board meeting and be fully implemented no later than February 1, 2015.

6-16-2014

Tasks. The following are the expected tasks and deliverables associated with the Electronic Catalog Management Software Services effort:

Task 1: Project Initiation

- a. Meet with District Technology Committee to develop and finalize a detailed work plan and schedule which at a minimum will establish meeting and presentation schedules, clarify roles and responsibilities of both staff and consultant teams in accordance with Electronic Catalog Management Software services terms and conditions and appropriate to meet the highest standard for the consultant's practice.
- b. Collect necessary data including existing catalog content, course data, college hierarchy, department information, faculty data, anticipated user account set up, desired search functions.
- c. Ability to convert from InDesign files into e-catalog system
- d. Individual college workflow analysis and creation of workflow systems process
- e. Obtain calendar layout and information
- f. Obtain associated course planning tools

Task 2: Customization

- a. Develop catalog design in accordance with college design intent including content and layout presentation
- b. Create rules for formatting
- c. Create custom data entry forms and fields
- d. Convert written text into tables where applicable
- e. Support student information systems data presentation
- f. Insert existing tables or images where applicable
- g. Functionality to see corresponding programs and arts within on click of course listing

Task 3: Implementation

- a. Adapt proposed system to meet the needs of existing IT systems including authentication of existing username and password credentials, integration between proposed system and existing databases.
- b. Create beta test site including site map for at least three sample programs and certificates from each school
- c. Individual college set up and deployment consultations
- d. Migrate previous year catalog from each college into software
- e. Review of template sample files and website template and ability to modify as needed
- f. Publish
- g. Final acceptance by colleges and District Technology Committee
- h. Dedicated catalog editor to fine tune layout before presenting for review

6-16-2014

- i. Upload entirely new set of courses each year to replace previous year's courses, rather than only replacing select courses.
- j. Package should include at-a-glance page showing the status of all pending approvals, with ability to notify approvers that they have a pending task.

Task 4: Training

- a. Train staff and end users on site and in person for start up

INSTRUCTIONS FOR SUBMITTING QUALIFICATIONS AND PROPOSALS

Firms shall submit seven hard copies and one electronic copy. Hard copies shall be formatted on standard 8 ½ x 11 white paper with each page clearly numbered on the bottom. Each section, 1 – 11 listed below, shall be tabbed. The original copy shall be marked "Original" and must be wet signed by person authorized to bind the firm.

"Qualifying firms must not be on the federal list of current companies or individuals that have been declared ineligible to receive Federal contracts due to a violation of Executive Order 11246, as amended; Section 503 of the Rehabilitation Act of 1973, as amended 29 U.S.C. Section 793; and/or the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended, 38 U.S.C. Section 4212".

All submittals shall be in the form and formatted as specified in this RFQ. **Submittals which do not include all of the elements as specified, or which deviate from the proposed format and content as specified, may be deemed "non-responsive" by the evaluation committee and eliminated from further consideration.**

Statement of Qualifications and Proposals should minimally include the following information:

1. **Cover Letter.** A maximum one-page, dated **Introductory Letter** must be submitted including the date, legal name of the respondent, address, telephone and fax numbers, and the name, title, and signature of the person(s) authorized to submit the proposal on behalf of the firm.
2. **Table of Contents.** A **Table of Contents** of the material contained in the proposal should follow the Cover Letter.
3. **Executive Summary.** The **Executive Summary** should contain an outline of your general plan and a brief summary of approach and qualifications to engage in a professional relationship with South Orange County Community College District. (two page maximum)
 - a. **Note:** Exhibit E, the Qualification Matrix, should be completed and placed in this section behind the executive summary. This form will be used as part of the review process.
4. **Experience.** Provide any professional registration, certifications and affiliations for the firm. Describe your experience with Third Party Evaluator Services and more particularly community college projects. Include the scope of work performed within the last five years. Specify which Projects were performed by the personnel recommended for this Work. Provide contact names and phone numbers for each listed project. **Financial Standing** - Provide a current annual report

6-16-2014

or audited profit and loss statement and the amounts and carriers of both general and professional liability insurance.

Evidence that the Firm is legally certified to conduct business in the State of California for the services offered and experience with college and university educational facilities and other institutional services.

The Firm must have an acceptable history of working proactively to avoid litigation. Provide specific information on termination for default, litigation settled or judgments entered within the last five (5) years.

- 5. Personnel.** This section of the proposal should establish the ability of the firm to satisfactorily perform the required services as demonstrated by its representation of staff availability. Information shall further specifically include:
- a. Number of qualified staff assigned to execute services
 - b. Identification of any services noted in the Agreement(s) not provided in-house
 - c. All personnel assigned to District projects, employees, sub-consultants or subcontractors must:
 - i. Possess the minimum qualification to perform the services provided
 - ii. Have knowledge and understanding of services and activities required to perform services provided
 - iii. Have a minimum of three years of directly related experience
 - iv. Have not entered into a subcontract with any Firms who are ineligible to perform work on a public works project pursuant to Labor Code 17777.1 or 17777.7
 - d. Include resumes of proposed personnel, including any proposed sub-consultants who would likely be assigned to projects. Provide name and professional qualifications of proposed personnel. Specifically define the role of each person and outline his or her individual experience. Identify any certifications or licenses held (No more than one page per person).
 - e. Firms must provide a statement that all proposed participants will meet or exceed the minimum qualifications specified herein
- 6. Scope of Work.** The Scope of Work provided describes the expected effort of the consultant; however, the consultant may recommend refinements, suggestions or brief restatements of the scope of work in this section. (Three pages maximum)
- 7. Services.** Not Used
- 8. Additional Data.** Provide additional information about the firm as it may relate to this RFQ & P. Indicate ongoing professional education of staff and total number of permanent employees. DVBE, Small business, small disadvantaged business, minority-owned firms, and

6-16-2014

small women-owned business participation level. Consortia of small businesses, minority-owned firms, and women's business enterprises are encouraged, and subcontracts with small businesses, minority-owned firms, and women's business enterprises are also encouraged.

- 9. Professional Fees.** Provide with your proposal one copy of a fixed fee **in a sealed envelope**. Itemize the fee similarly to the breakouts found in the sample agreement. The selection committee will make their recommendation based on qualifications and will then enter contract negotiations including fee based discussions.

A Fixed Fee proposal will be based on fully-loaded hourly billing rates for each services classification. When providing costs, proposal shall include costs for all required overhead expenses including insurance. Travel cost from the Firm's place of business including time, overhead and related expenditures shall be incorporated into the unit prices for each line item and are not to be identified as separate costs. Firms are expected to perform services at the rate amount in the fee proposal regardless of the possibility that staff is drawn from a variety of office locations.

Fixed Fees provided in this submittal will be used as the basis for contract negotiations. The final all inclusive rate shall be negotiated after the selection process. Any increases must be approved in writing by the District prior to the performance of service. Agreements will be based on a lump sum basis.

No separate payment will be made for any other costs of performance or out of pocket expenses, including, without limitation, mileage or time required for dispatching personnel to District locations, subsistence, lodging, fuel charge, vehicle use, transmitting reports, administrative charges, or other similar activities necessary for performance of the services except for personnel that are required to perform services at a destination that is more than 50 miles from Saddleback College. If this circumstance occurs, firm shall first obtain written approval and will be reimbursed at the rate for mileage (for such mileage over 50 miles) set forth by the United States Internal Revenue Services and for per diem travel as set forth by the US General Services Administration.

Proposers shall specifically include hourly rates for full time services in their proposals for the following:

- Principal
- Lead – Project Manager/Evaluator
- Associates
- Clerical staff
- Overtime and Weekend Rates for the above
- Proposer may choose to provide an itemized fee schedule for extra or additional services that are not within Scope of Services
- Include fee schedules for consultants if used

6-16-2014

Identify any constraints or assumptions that affect the proposed fee. Services that are not specifically included in RFQ exhibits may be provided as supplementary information. **Be thorough and specific as this will form the basis of any contract negotiations for services.**

10. Client References. This section of the proposal permits firms to demonstrate their ability and competence to satisfactorily perform the required services by using similar services recently completed for other clients. Information should be furnished for both the firm and any sub consultants included in the proposal and shall include:

- a. Project name, location and description
- b. Client contact name
- c. Telephone number
- d. Email address

This section may also include letters of recommendation or testimonials

11. Agreement Template Submittal. Provide a draft Agreement for District review.

12. Certification. Complete, provide authorized signature, and date the CERTIFICATION - REQUEST FOR QUALIFICATION & PROPOSALS enclosed with this RFQ & P

Responses to the RFQ & P should be complete and be prepared to provide an insightful, straightforward, and **concise** overview of the capabilities of your company. **Deviation from the defined content, order and format prescribed in this RFQ & P may result a non-responsive evaluation. Submittals received after the due date and time will not be considered or reviewed. The emphasis of your submittal should be on completeness and clarity of content.**

The District reserves the right to waive any immaterial deviation in a submittal. The decisions to provide a waiver shall in no way modify or compromise the overall purpose of the submittal, nor excuse the Firm from full compliance with all requirements if awarded an Agreement.

BASIS OF AWARD

The selection of the Electronic Catalog Management Software Services will be based on analysis principally focusing on specific experience and qualifications identified within the proposal. The final stage of the selection process is successful contract negotiations.

Electronic Catalog Management Software Services will be selected on the basis of criteria regarding qualifications, experience, demonstrated competence as well as the best interests of the District as determined by the committee, including consideration of fair and reasonable pricing.

Prior to presenting a recommendation to the Board of Trustees, District staff will engage in contract negotiations with selected firm. If negotiations with the first team selected are unsuccessful, negotiations will commence with the second team and so on until an agreement has been successfully negotiated or SOCCCD rejects all proposals.

Request for Qualifications and Proposals
Electronic Catalog Management Services
Irvine Valley College and Saddleback College

6-16-2014

Note: By virtue of submission, the proposing firm declares that all information provided in the Statement of Qualifications is true and correct.

6-16-2014

MISCELLANEOUS

1. General information about SOCCCD may be found at <http://www.socccd.edu>. Recent projects are listed at the "Bids" tab.
2. All submittals shall remain active and valid for ninety days following closing date for receipt. The District reserves the right to negotiate the scope and cost of any submittal.
3. Selection may be made solely on the basis of the submittal review or the selection committee may deem it necessary to interview applicants as part of the selection process.
4. The proceedings of the selection committee are confidential. Members are not to be contacted by the proposers. All communication between proposers and the District shall be through the contact information provided above for submitting RFQ & P materials.
5. All materials, except financial information, submitted in response to this RFQ & P shall become the property of SOCCCD and shall be considered a part of Public Record. The District reserves the option to retain or dispose of all submittals whether selected or rejected.
6. Only written changes to the RFQ & P will be valid. Verbal representations will not be binding on either party. Proposers are responsible to monitor the district bid page for addenda information.
7. SOCCCD reserves the right to reject any or all responses to this RFQ & P. Any and all costs incurred in preparing and submitting a response to this RFQ & P is the sole responsibility of the proposer. This request does not constitute an offer of employment or a contract for services.

QUESTIONS FROM POTENTIAL RESPONDENTS

The District may modify the RFQ & P prior to the deadline for submittals by issuance of an electronic addendum on the district bid website. Acknowledging Firms will receive response email with addenda information if any is provided.

Specific Inclusions

1. **Exhibit A: Certification – Request for Qualifications**
2. **Exhibit B: Sample fee schedule for extra work**
3. **Exhibit C: Sample Invoice for monthly billings**
4. **Exhibit D: Electronic Catalog Management Software Services – Qualification Matrix**

Proposals shall be received up to but not later than 2:00 p.m., on the date listed in the schedule.

6-16-2014

RFQ & P - Exhibit A

CERTIFICATION – REQUEST FOR QUALIFICATIONS & PROPOSALS

CERTIFICATION - REQUEST FOR QUALIFICATIONS

The undersigned hereby proposes and agrees to furnish any and all required labor, equipment, material, transportation, insurance, and incidentals necessary to provide quality services pertaining to this solicitation in accordance with the terms and conditions of the RFQ & P; declares that the only persons or parties interested in this submittal as principals are those named herein; that this submittal is made without collusion with any other person, firm or corporation; that the undersigned will contract with SOCCCD to provide these services to the District in the manner prescribed herein.

I certify that I have read the attached **Request for Qualifications – Electronic Catalog Management Software Services** and the instructions for submitting an RFQ & P. I further certify that I am authorized to bind the Firm noted in this submittal contractually, know that I must provide seven hard copies and one electronic copy of the Firm's submittal in response to this request and that I am authorized to commit the Firm to the submittal.

I acknowledge the following addenda(s) _____

Signature

Typed or Printed Name

Title

Phone

Address

Email

Provide Seal here, if Corporation

6-16-2014

RFQ & P - Exhibit B

SAMPLE: CRITERIA AND BILLING FOR EXTRA WORK

The following rates which include overhead, administrative cost and profit shall be utilized in arriving at the fee for extra services. The hourly rates reflected below shall be effective by date of execution of this Contract and shall be revised each twelve (12) months; thereafter, based upon changes in the Consumer Price Index for the previous twelve month period, using the CPI for the geographical area of the CONSULTANT.

<u>CONSULTANT Services</u>	<u>Fee Per Hour</u>
Principal	\$XXX
Associate	\$XXX
Project Manager	\$XXX
Special Services: CEO/Principal Consultant	\$XXX
Clerical	\$ XXX

Request for Qualifications and Proposals
 Electronic Catalog Management Services
 Irvine Valley College and Saddleback College

6-16-2014

RFQ & P - Exhibit C

SAMPLE: TEMPLATE FOR MONTHLY INVOICE

Invoices for services shall be provided once per month and within 60 calendar days of performance of the services.

Invoice

Project Manager

South Orange County Community College District
 28000 Marguerite Parkway
 Mission Viejo, CA 92692-3635

Date: TBD

SOCCCD Project Number: TBD
 Consultant Invoice number:

Purchase Order: TBD

Project: Irvine Valley College and Saddleback College
 Electronic Catalog Management Software Services

Consultant TBD

Consultant Address
 City/State/Zip code
 Phone Number

Professional Services from Month/01/Year - Month/31/Year

Billing	Percent of Fee	Fee	% Comp	Earned	Previous Billing	Current Billing	Balance Remaining
Task I		XX.00		0.00	0.00	0.00	XX.00
Task II		XX.00		0.00	0.00	0.00	XX.00
Task III		XX.00		0.00	0.00	0.00	XX.00
Task IV		XX.00		0.00	0.00	0.00	XX.00
TOTAL CONTRACT AMOUNT		0.00		0.00	0.00	0.00	XX.00
<i>Amendment 01</i>							
REVISED CONTRACT AMOUNT		0.00	0.00	0.00	0.00	0.00	XX.00

Reimbursable Expenses

List reimbursable items

Total Reimbursable rate at 1.1

times

TBD

1.1

TBD

TOTAL THIS INVOICE _____

RFQ & P EVALUATION MATRIX

Electronic Catalog Management Software Services RFQ & P Evaluation Matrix		
Firm: Location: (City/State) Reviewer:		
	NOTE: Firm to validate quantities listed on this sheet with supporting documentation in appropriate proposal tab sections	
Tab	Description	Evaluation
1	Cover Letter - Professional/Format/Signed	
2	Table of Contents - Correct & Professional	
3	Executive Summary - professional - coherent - relevant - concise	
4	Experience	
	Years in business	
	Number of Projects in past 5 years	
	# Contract terminations in last 5 years	
	# Mediation/Litigation in last 5 years	
5	Personnel	
6	Scope of Work	
7	Services – not used	
8	Additional Data re. Company	
	Other	
	DVBE	
9	Fee Proposals Rates-Sealed Envelope	
10	Client References	
11	Agreement Review	
12	Certification signed w/ correct # of addenda noted	