



# REQUEST FOR PROPOSAL P-26-001

## Enterprise Resource Planning System

**PROPOSAL DUE DATE: May 29, 2026**  
**PROPOSAL DUE TIME: 3:00 P.M. CST**

### SCHEDULE OF KEY EVENTS

EVENT	Date/Deadline	Notes
RFP Issuance	April 22, 2026	Date RFP is publicly released
Registration Deadline for Pre-Proposal Conference	May 6, 2026 5:00pm CDT	Vendors must contact: Tomeka Jones Assistant Chief Information Officer-Enterprise Applications <a href="mailto:tjones40@montevallo.edu">tjones40@montevallo.edu</a>
Mandatory Pre-Proposal	May 8, 2026 10:00am-11:30am CDT	Attendance is required. Vendors must register in advance to receive meeting access. Vendors not attending will not be eligible to submit a proposal.
Proposals Due	May 29, 2026 3:00pm CDT	
Award Announcement	July 1, 2026	
Work to begin	September 1, 2026 (tentative)	

*The University of Montevallo reserves the right to change the RFP schedule. Should this happen, an addendum will be sent to all vendors, as well as posted on our website. If an emergency or unanticipated event interrupts normal University processes to cause the postponement of the scheduled proposal opening or the issuance of an addenda, the University Representative will issue, in writing, to all Respondents, the new timeline and process.*

### SUBMIT PROPOSALS TO:

Purchasing  
 75 College Drive, Station 6012 University of  
 Montevallo, Alabama 35115

DeAnna Smith, DBA, CPA, CIA  
 Vice President for Business Affairs, Treasurer, & Chief Financial Officer  
 University of Montevallo

# **OUTLINE OF REQUEST FOR PROPOSAL**

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## DEFINITIONS

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Except as otherwise specifically provided, definitions are set forth as follows:

***Montevallo/University***— Refers to the University of Montevallo

***Request for Proposal (RFP)*** - Refers to the document named University of Montevallo's Request for Proposal

***Respondent/Vendor*** – Refers to the firm that is interested in and/or responds to the RFP

***Proposal/RFP*** - Refers to all documents that the Vendor must submit to the University of Montevallo Representative prior to the deadline.

***RFP Deadline*** - Refers to the time and date indicated in the RFP as the latest date and time that an RFP will be accepted.

***Contract*** – Refers to the final agreement reached between the awarded vendor and the University.

***Contractor*** - The term Contractor shall mean the awarded Vendor performing the services as outlined in the Contract.

***ERP*** – Enterprise Resource Planning

***Subcontractor*** — The term Subcontractor shall mean any individual, company, or corporation to whom the Contractor assigns any part of the Contract.

## **UNIVERSITY INFORMATION**

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The University of Montevallo is a small public liberal arts university with an enrollment of approximately 2500 undergraduate and 500 graduate students. Of that number, approximately 1000 live on-campus and another 800 to 1000 live in the city of Montevallo. UM retains many of the components and traditional objectives of the undergraduate liberal arts college.

Famous for its red brick streets and paths, the 160-acre main campus has more than 40 buildings surrounded by lawns, groves, and flower beds. The central portion of the campus is a National Historic District with two antebellum structures, including the 1823 Edmund King House. The Olmstead Brothers -- landscape architects famous for designing New York's Central Park, Atlanta's Ponce de Leon Avenue parks, and the grounds of the Biltmore Estate near Asheville, North Carolina -- also developed the first plan for the Montevallo campus. Their basic design ideas are still followed.

The University of Montevallo educates the student as a whole person. We believe that a great deal of education and other important social and physical development takes place outside of the classroom.

The University is committed to forming a partnership with a provider who truly understands the small college campus marketplace, who has demonstrated an outstanding level of service and performance, and who has sufficient resources, financial stability and experience. It is essential that the requested services be of the highest quality possible and that the program be managed with maximum sensitivity to the needs and concerns of our students, faculty and staff.

## SCOPE OF SERVICE

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The University of Montevallo currently operates the **Ellucian Banner** ERP system in an on-premises environment. In addition, the institution relies on a variety of independent systems that function either in isolation or with limited integration. In many cases, these systems exchange data through one-way processes, which restricts system integration and limits the efficient flow of information across the institution.

The University of Montevallo is seeking proposals for a SaaS Enterprise Resource Planning system that provides seamless integration across key operational areas, including but not limited to **Student Information, Finance, and Human Resources**. The proposed solution should support the specialized needs of higher education by offering robust functionality for areas such as **academic advising, financial aid, housing, and student retention**, while enabling efficient **data management, reporting, and communication** across campus departments. The system should also enhance **student experience** by providing intuitive, self-service capabilities that allow students to easily access information, manage their academic and financial records, and interact efficiently with university services.

### Integration and Flexibility

The proposed SaaS ERP system must be flexible enough to integrate with a variety of software solutions and support diverse institutional processes. At the same time, the University seeks to reduce its reliance on numerous disconnected applications by consolidating functions within the ERP wherever practical. The ideal solution should provide the adaptability needed to work with essential third-party systems while also streamlining operations, improving efficiency, and minimizing the administrative burden of maintaining multiple separate software platforms.

Key third-party applications include, but are not limited to:

<b>Application</b>	<b>Vendor</b>	<b>Primary Function</b>
Slate	Technolutions	Admissions CRM
Canvas	Instructure	Learning Management System
Argos	Evisions	Reporting and Analytics
IntelleCheck	Evisions	Check Processing / Payment Processing
Transact Campus	Transact	Campus Commerce / Payments
25Live	CollegeNET	Space Management
AwardSpring	AwardSpring	Scholarship Management
Microsoft Entra ID	Microsoft	Identity and Access Management

## **Change Management, Training and Implementation Support**

The Vendor shall provide a structured and comprehensive change management, training, and support plan as part of the implementation of the SaaS ERP solution.

The Vendor shall assign a dedicated **Project Manager** for the duration of the project. The University of Montevallo reserves the right to review and select the preferred candidate. The selected Project Manager must be assigned to the project for the duration of the implementation at an agreed-upon allocation and may not be removed, reassigned, or replaced without prior written consent from the University. This individual shall serve as the primary liaison between the Vendor and the University and shall be responsible for overall project coordination, issue tracking, risk management, timeline oversight, and stakeholder communication. At a minimum, the Vendor shall conduct **weekly status meetings** with the project team to review progress, completed tasks, upcoming activities, risks, issues, and any decisions requiring attention.

The Vendor shall provide a **change management plan** that addresses organizational readiness, stakeholder communication, end-user adoption, and transition support.

The Vendor shall provide a **role-based training plan** tailored to the needs of different departments and user populations. Training shall be designed to address the unique needs of functional areas and technical staff and shall include appropriate learning paths for end users, power users, and system administrators.

The Vendor shall provide **online training resources**, including recorded sessions, user documentation, job aids, and other self-service materials that can be used both during implementation and after go-live.

The Vendor shall also provide **dedicated support during go-live and the stabilization period**, including timely issue response, escalation procedures, and access to functional and technical experts needed to support a successful transition.

## **Required Deliverables**

The Vendor shall provide all project deliverables required for implementation and transition to the proposed SaaS ERP solution. At a minimum, these deliverables should include project management documentation, implementation and communication plans, change management materials, role-based training plans and resources, testing and conversion documentation, go-live support materials, post-go-live stabilization support documentation, and a clear pricing proposal. Pricing should identify all one-time and recurring costs associated with the solution and implementation, including software subscription fees, implementation services, data conversion, integrations, training, travel if applicable, go-live support, and any optional services or additional costs.

Vendor shall provide references from institutions that have implemented the proposed SaaS ERP solution within the past five years. Preference should be given to references from colleges or universities with similar operational, academic, and administrative complexity. The institution reserves the right to contact any references provided and to consider reference feedback as part of the evaluation process.

### **Required deliverables may include, but are not limited to:**

- Project plan and implementation timeline
- Risk, issue, and decision logs
- Change management plan
- Communication plan
- Training plan by functional area
- Testing plan
- Data conversion and integration documentation
- Go-live plan and readiness checklist
- Post-go-live support and stabilization plan

## **Data Security and Accessibility**

Vendors must provide the following documentation and information as part of their proposal. Failure to include these materials may result in disqualification:

- VPAT
- HECVAT
- Most recent SOC 2 report for the SaaS environment (not one for a cloud service provider such as Amazon Web Services or Microsoft Azure)
- Data Privacy Policy

- Information Security Policy
- Data Backup Policy
- Uptime and availability guarantees

## **CODE OF CONDUCT & FAIR COMPETITION**



It is the responsibility of the vendor to notify the University of Montevallo Representatives in writing of any possible conflict of interest as set forth below. The University will investigate the matter and determine if an actual conflict of interest exists.

A conflict of interest arises when a University employee, officer or agent involved in the RFP process or contract has a financial or any other interest in a vendor. If a conflict of interest exists, the vendor may not submit a Proposal.

University employees, officers and agents may neither solicit nor accept gratuities, favors, or anything of monetary value from vendors, contractors, or parties to sub-agreements. Any such action must be reported to the University representatives immediately.

The University reserves the right to cancel the award if, in its sole discretion, it determines that any interest disclosed from any source could give the appearance of a conflict or cause speculation as to the objectivity of the program to be developed by the vendor. The University's determination regarding any questions of conflict of interest shall be final.

By submitting their proposals, all vendors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other vendor, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement

transaction of any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised unless consideration of substantially equal or greater value was exchanged.

*Each Vendor shall accompany his proposal with a sworn statement that he has not been party to such an agreement.*

## **COMPLIANCE WITH FEDERAL, STATE & LOCAL LAWS**



1. When awarded, this quotation is subject to provisions of Title 7 of the Civil Rights Act of 1964 and parts II, III, and IV of the Executive Order 11246, dated September 4, 1965. In connection with the execution of the contract, the contractor shall not discriminate against any employee or applicant for employment because of race, religion, age, color, gender, veteran status, national origin, or disability. The Contractor shall take affirmative action to ensure that applicants are employed, and that employees are treated during their employment without regard to their race, religion, color, gender, age, national origin, veteran status or disability. Such action shall include, but not be limited to, the following: employment, promotion, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and all other terms and conditions of employment.
2. The vendor agrees that he will not discriminate against any employee or applicant because of physical or mental disabilities, as required by federal law-Rehab. Act. Public Law 93-112 of 9/26/73; Affirmative Action Clause, Section 741.3; and Americans with Disabilities Act, Public Law 101-336, 7/26/90.
3. The University of Montevallo is an EEOC. The University does not discriminate on the basis of gender in the education programs and activities which it will operate, pursuant to the requirements of Title IX of the Education Amendments of 1972, Pub. Law 92-318. The University conforms to all applicable rules, regulations and relevant orders of the Secretary of Labor. Relevant regulations are incorporated by reference.
4. Federal, state, county, and local laws, ordinances, rules, and regulations that in any manner affect the items covered herein apply. Lack of knowledge by the vendor will in no way be a cause for relief from responsibility. This shall include obtaining all appropriate licenses and permits necessary, if applicable.
5. It shall be the Vendor's responsibility to ensure that its employees are legally qualified to engage in work in the United States and that the Vendor's employment practices are in full compliance with prevailing laws, including applicable regulations of the Immigration and Naturalization Service.

6. The Vendor shall comply with all OSHA regulations pertaining to the health and welfare of its employees, especially those employees who may have on occasion to clean up blood and body fluid spills.
7. The Contractor shall provide all federal, state and local licenses and permits necessary at the time this contract is executed, covering the service the Contractor provides to the University. The Contractor shall pay all applicable permits, licenses, excise and retail sales and other taxes and all fees for approvals and renewals thereof required; give all notices; and comply with all laws, ordinances, rules, and regulations of the City of Montevallo, Shelby County, and the State of Alabama.
8. The University is a component unit of the State of Alabama and is, therefore, exempt from Federal Excise Taxes and is also exempt from Alabama State and local sales or use taxes. All costs associated with the Contract must be stated in U.S currency.

## **COMPLIANCE WITH UNIVERSITY POLICY**



1. The vendor shall ensure that all employees and contractors conduct themselves in accordance with University standards and all applicable policies while performing services on University premises. The University reserves the right to request that any employees engaged in inappropriate behavior be asked to leave the premises for the duration of the project.
2. All Vendor personnel assigned to the project, including subcontractors and third-party representatives, must agree to and comply with the University's FERPA requirements.

## **LIMITATION OF LIABILITY**



1. The Vendor, without exception, shall indemnify and save harmless the University and its employees from liability of any nature or kind, including cost and expenses for or on account of any copyrighted, patented, or unpatented invention, process, or article manufactured or used in the performance of the contract, including its use by the University. If the Vendor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the proposal prices shall include all royalties or cost arising from the use of such design, device, or materials in any way involved in the work.
2. The Vendor shall save and hold the University harmless from actions or claims against the University which may arise in connection with the scope of work specified herein and for sale of products or for performance or failure to perform of any service under this contract or for any/all injuries or death or property damage resulting or arising from the operation by the

Vendor of any vehicles or arising or resulting on or adjacent to the University premises.

3. The University will not enter into a contract which contains a clause requiring the University to indemnify or hold harmless any party. Any exception will be limited to the terms and limits of the University's general liability insurance coverage or an Alabama Board of Adjustments ruling.
4. The University will not enter into any contract which contains a clause limiting its remedies against any party. Any exception will be only to the extent permitted by Alabama law.
5. Notwithstanding anything in these conditions or other applicable conditions to the contrary, any provision(s) will not apply to the extent it is (they are) finally determined by a court of competent jurisdiction, including appellate review if pursued, to violate the laws or constitution of the State of Alabama. Such determination shall not affect the validity of the remainder of the contract.
6. Any contract resulting from this solicitation shall be governed in all respects by the laws of the State of Alabama and any litigation with respect thereto shall be brought in the courts of Shelby Conty of the State of Alabama.

## **PREPARATION & SUBMISSION OF RFP**

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1. Proposal will be received for items specified herein or attached hereto under the terms and conditions of this Request for Proposal (RFP).
2. In order to be considered, three (3) copies (one original and two copies) of each proposal, under seal, along with a flash drive containing an electronic copy of the proposal, must be delivered to:

Purchasing  
75 College Drive, Station 6012  
University of Montevallo  
Montevallo, Alabama 35115

no later than **3:00 pm C.D.T. on 05/29/2026**. At this time, proposals will be opened for the sole purpose of recording the names of vendors. It is the vendor's responsibility to ensure that his RFP is delivered so as to ensure timely receipt by the Purchasing Office. Proposals or unsolicited amendments to proposals arriving after the closing time and date will not be considered.

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

to legally bind the person, partnership company, or corporation submitting the proposal. A corporation must indicate place and date of incorporation. A representative or distributor responding to the RFP in the name of a principal should give the name of the firm to which an order should be issued in the event of an award. The signature must be notarized.

4. Proposals must include all applicable requested information and meet all specification requirements. If significant errors are found in the proposal, or if the proposal fails materially to conform to the requirements of the RFP, the proposal will be rejected. Erasures or other changes must be initialed by the person signing the proposal.
5. Proposals are to be valid for at least 120 days following the closing date for this RFP. This period may be extended by written mutual agreement between vendor and the University of Montevallo.
6. Proposals are to be prepared simply and, in a manner, designed to provide the University with a straightforward presentation of the contractor's capability to satisfy the requirements of this RFP.
7. Should any vendor find discrepancies in, or omission from, the specifications, or be in doubt as to their meaning, the vendor shall notify the Purchasing Office at once and obtain a clarification prior to submitting a proposal. Interpretations which change the terms, conditions or specifications will be made in the form of an addendum to this request for proposals. If issued, the addendum will be sent promptly to all parties to whom the request for proposals has been issued. Receipt by a Vendor of an amendment to this RFP must be acknowledged by email within forty-eight (48) hours of receipt. The acknowledgement should be addressed to Trey Felker at [gfelker@montevallo.edu](mailto:gfelker@montevallo.edu).
8. Vendors are encouraged to submit any additional information or comments they wish considered. This additional information should be included as a separate appendix to the proposal.
9. Any explanation desired by a vendor regarding the meaning or interpretation of the RFP, attachments, specifications, etc., must be requested in writing. Any information given to a vendor concerning the RFP will be furnished to all vendors as an addendum to the RFP, if such information is necessary to vendors in submitting offers on the RFP, or if the lack of such information would be prejudicial to uninformed vendors.
10. After award of the contract, all proposals will be open for public inspection. Trade secrets, test data, financial data, and similar proprietary information will, to the extent provided by law, remain confidential, provided such material is so marked. However, net cost information will not be considered confidential.

11. The Vendor must bear all costs associated with the preparation and submission of the proposal and of any visit to the University.
12. Vendors must, upon request of the University, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of this RFP. The Vendor must satisfy the University that he is able to meet the conditions of the agreement without subletting the service in whole or in part.
  - a. In addition, the University of Montevallo may make such reasonable investigations as deemed proper and necessary to determine the ability of the vendor to perform the work, and the Vendor shall furnish to the University of Montevallo all such information and data for this purpose as may be requested. The University reserves the right to inspect the Vendor's physical plant prior to award to satisfy questions regarding the vendor capabilities. The University of Montevallo further reserves the right to reject any offer if the evidence submitted by, or investigations of, such vendor fails to satisfy the University that such offeror is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein.
13. Each Vendor shall fully acquaint himself with conditions relating to scope and restrictions attending the execution of the work under this RFP. The failure or omission of a vendor to acquaint himself with existing conditions shall in no way relieve him of any obligation with respect to this RFP or to the contract.
14. Proposals submitted prior to the RFP opening date will be held in the Purchasing office. No proposals will be opened prior to the opening date.
15. A contract shall be awarded to the Vendor whose proposal is determined to be most advantageous to the University. The University is not bound and will not accept any proposal based on price alone, but will make an award based on the evaluation factors set forth herein. The University further reserves the right to reject any and all proposals, to waive any informality in proposals, and unless otherwise specified by the offer, to accept any item in any proposal. The University will be the sole judge as to whether the Vendor's proposal has or has not satisfactorily met the requirements of this RFP.
16. Prior to the deadline, a submitted proposal may be withdrawn by written notice to the University Representative. Written requests to withdraw must be signed by an authorized person on behalf of the Vendor and shall not reveal the amount of the proposal. A withdrawn proposal may be resubmitted prior to the deadline. All resubmitted proposals must fully comply with the RFP. The University will only consider the latest version of the proposal.
17. Vendors are cautioned that the University is not obligated to ask for or accept after the closing date for receipt of proposals, which is essential for a complete and thorough evaluation of the proposal. The University may award a contract based on initial proposals received

without the discussion of such proposals. Accordingly, each initial proposal should be submitted on the most favorable and complete operating and technical terms possible.

18. At the assigned date, sealed RFP's are publicly opened and recorded. The file becomes public record after the proposal has been thoroughly evaluated and the award determined. The file may be reviewed at the Purchasing Office.
19. In case of any doubt or differences of opinion as to the items to be furnished hereunder, the decision of the University shall be final and binding on both parties.
20. In comparing the RFP's and awarding the contract, the University may consider such factors as relative quality and adaptability of supplies or services, the vendors' financial responsibility, skill, experience, record of integrity, marketing and customer service plans, the time of delivery or performance offered, information gained from reference checks, interviews of Vendor's personnel and management, and any other element or factor in addition to that of the proposal price which would affect the final cost to the University and whether the Vendor had complied with the specifications.
21. In submitting a proposal, the Vendor agrees not to use the results of the proposal process in any commercial advertising.
22. The University reserves the right to reject all or any part of your proposal and to award the contract to other than the low vendor.
23. All prices and notations must be printed in ink or type written. No erasures permitted. Errors may be crossed out and corrections printed in ink or typewritten adjacent and must be initialed in ink by person signing RFP.
24. By submitting a proposal, the vendor agrees to be governed by the terms and conditions as set forth in this document. Any proposal containing variations from terms and conditions set forth herein may, at the sole discretion of the University, render such proposal unresponsive. Failure to examine any drawings, specifications and instructions will be at vendor's risk.
25. All vendors must complete a State of Alabama Disclosure, which is included in the document, and return it with their RFP. Further, all vendors must disclose the name of any University employee who owns, directly or indirectly, at least 1% interest in the vendor's firm or any of its branches. Proposals by University employees will only be accepted in accordance with Alabama Code 36-25-11.

## **EVALUATION & AWARD**

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A contract shall be awarded to the Vendor whose proposal is determined to be most advantageous to the University. The University is not bound and will not accept any proposal based on price alone but will make an award based on the evaluation factors set forth herein. The University further reserves the right to reject any and all proposals, to waive any informality in proposals, and unless otherwise specified by the offer, to accept any item in any proposal. The University will be the sole judge as to whether the Vendor's proposal has or has not satisfactorily met the requirements of this RFP.

In awarding the Contract, the University will consider a number of factors in combination in evaluating the proposals submitted. Factors will include, but not be limited to the following, which are not listed in order of importance:

- a. Contractor's record of performance and service in higher education institutions in relation to services requested.
- b. Contractor's conformance to RFP's specifications, requirements, terms, conditions, and provision.
- c. Contractor's response to University's objectives.
- d. Contractor's pricing.
- e. Service aspects of Contractor's proposal.
- f. Personnel aspects of Contractor's proposal.
- g. Review of recommendations with respect to Contractor's operations at other similar universities and colleges.
- h. Extent of Contractor's size, credit standing, financial record, stability, and management

**Failure to provide any of the requested information may be grounds of rejection of your proposal.**

The University of Montevallo will issue an Award Letter once a selection has been made. All materials submitted in response to this RFP become the property of the University. Selection or rejection of a response does not affect this right.

The University reserves the right to make an award without further discussion of the Proposal submitted; there may be no best and final offer procedure. Interviews and negotiations may be conducted with one or more of the Respondents, but there shall be no obligation to receive further information from any Respondent. Therefore, each initial offer should contain the Respondent's best terms from a cost or price, service, and technical standpoint.

The University may consult references familiar with the Respondent regarding its prior operations and projects, financial resources, reputation, performance, or other matters. Submission of a Proposal shall constitute permission for the University to make such inquiries and authorization to third parties to respond thereto.

The University may elect to initiate contract negotiations with one or more Respondents including negotiation of costs/price(s) and any other issues or terms and conditions, including modifying any requirement in the RFP. The option of whether or not to initiate contract negotiations rests solely with the University. No Respondent shall have any rights against the University arising from such negotiations. The Respondent will be responsible for their travel and per diem expenses, required for any presentations, discussions, and/or negotiations.

The University reserves the right to award multiple contracts for the products, work and/or services that are the subject matter of this Proposal and Respondent(s) are hereby given notice that they may not be the University's only Contractor or Respondent for such products, work and/or services.

As a result of the selection of a Respondent to supply products and/or services to the University, the University is neither endorsing nor suggesting that the Respondent's product or service is the best or only solution. The Respondent agrees to make no reference to the University in any literature, promotional material, brochures, sales presentation or the like without the express written consent of the University.

## **SPECIFIC PROPOSAL REQUIREMENTS**

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### **BUSINESS STRUCTURE & HISTORY**

1. Provide your company's name and address, and the primary RFP contact's name, phone number, e-mail address and fax number.
2. Please give a brief history of the company including the year organized, the year it began providing requested services, and the nature of the firm's ownership and specific details with regard to any affiliated companies or joint ventures.
3. Please provide the location of each of your company's offices. Indicate which office would service this account.
4. Please list your firm's lines of business and the approximate contributions of each business to your organization's total revenue. If you are an affiliate or subsidiary of an organization, what percentage of the parent firm's total revenue does your subsidiary or affiliate generate?
5. Please discuss the overall business objectives of your firm with respect to future growth. Comment on any present or planned areas of emphasis over the near future.
6. Is Vendor incorporated? If so, in what state and as what type of corporation?

7. Is Vendor associated with any State contracts or Cooperative Purchasing Agreements?
8. List any material claim asserted or threatened against Vendor that may have a significantly adverse effect on Vendor or adversely affect Vendor's ability to provide the goods or services required by this RFP.
9. List any business issue currently confronted by Vendor that may have a significantly adverse effect on Vendor or adversely affect Vendor's ability to provide the goods or services required by this RFP.
10. List 5 of your customers using the service covered by this Proposal similar in size, industry sector, and geographical presence to Montevallo. Please provide:
  - Customer name and address
  - Customer employee size
  - Contact names and telephones (business and technical)
  - Brief description of the service provided
  - How long has Customer been using Vendor to provide services?
11. List information regarding 2 of your customers (must currently be operational) previously using Vendor to provide services that **no** longer is using Vendor to do so. Please provide:
  - Customer names and addresses
  - Describe service provided by Vendor
  - Contact names and telephones
  - How long were these Customers using Vendor to provide the service?
  - Why did these Customers cease their business relationship with Vendor?
12. Describe other current products/services Vendor has provided to the University of Montevallo (if applicable).
13. Describe any existing or pending contracts between Vendor and the University of Montevallo.
14. What policies and procedures do you have in place to prevent any conflict of interest?
15. Describe the relevant aspects of your staffing:
  - Vendor's organizational structure with a chart
  - Vendor's staffing by major division
  - How is staff allocated among Vendor's customers?

16. List the name and location of primary individual(s) who would be responsible for our account and provide brief biographies including titles, functions, academic credentials, and relevant experience. Include the role of each consultant for this assignment, the role of back-up personnel and how many clients are assigned to each person named above?

#### FINANCIAL INFORMATION

1. Please provide your Dun and Bradstreet (DUNS) Number, if any.
2. Please provide your current DUNS rating.
3. Please provide your Standard and Poor's rating.
4. Vendor must attach its most recent annual report or certified financial statement as well as most recent SEC 10K filing.
5. Please provide your previous year's revenues.
6. What percentage of Vendor's annual revenues would any contract resulting from this Proposal represent?
7. Please describe any subcontractor relationships that would be involved in the support of any University of Montevallo contract. Please note: The use of any subcontractor requires University approval in advance. Failure to do so may result in termination of contract.
8. Please provide a completed vendor registration packet, to be found at [www.Montevallo.edu](http://www.Montevallo.edu).

#### OTHER INFORMATION

1. How do your people, processes, and tools differentiate you from your competitors?
2. How do you propose to provide value to and partner with the University of Montevallo?
3. Based on the information provided, please provide a fee quote for the related services. Is the fee guaranteed for a certain period of time? If so, please specify the duration.
4. Please include a sample Statement of Work for these services, including the terms and conditions on which you would work with the University.
5. Please include your billing structure. The University does not generally pay in advance or pay late fees or interest.
6. Provide in detail and load/start up or ancillary charges that may be incurred that are not

included in the fee quote.

7. Vendor must include transition plan to ensure a smooth transition and uninterrupted services as it relates to the provided timeline.

## **TERMS & CONDITIONS OF CONTRACT**



1. Both the Request for Proposal and the Vendor's response to the RFP will be incorporated by reference into the resulting contract.
2. The Vendor shall be responsible for the complete performance of all the work under the contract and for the methods and means used in performing the contract. The Contractor is considered self-sufficient; therefore, he must provide all necessary personnel, material, and supplies.

The Vendor shall be responsible for any damage to University property while executing any portion of the services requested.

3. In case of failure to deliver goods and services in accordance with the contract terms and conditions, the University of Montevallo, after due oral or written notice, may procure them from other sources and hold the Vendor responsible for any resulting additional purpose and administrative costs. This remedy shall be in addition to any other remedies which the University may have.
  - A. The supervision of the performance of this contract is vested in the Vice President for Business Affairs. The Vice President will decide any and all questions which may arise under the contract including, but not limited to, the quality and acceptability of work.
  - B. The University may require changes, additions or deletions in the scope of the services to be performed by the Contractor hereunder. All such changes, which are mutually agreed upon by and between all the parties, shall be incorporated in written amendments to this contract. All such amendments shall state any increase or decrease in the amount of the compensation due to the Contractor for the change in scope. All amendments are binding only if they are approved and signed by the appropriate University authority.

## **TERM OF CONTRACT**



Work is anticipated to start on or about **September 01, 2026 with a completion targeted by December 2028**. These dates are estimates and may be adjusted based on project needs, approvals, and other factors.

If the Contractor fails to fulfill its obligation under this contract properly and on time, or otherwise violates any provision of the contract, the University of Montevallo may terminate the contract by

written notice to the Contractor. The date of termination will be determined at the sole discretion of the University. The notice shall specify the acts of omissions relied on as cause for termination.

Such acts may include, but are not limited to:

- \*Contractor's failure to maintain required insurance coverage.
- \*Contractor's failure to furnish a stable work force.
- \*Contractor's failure to furnish competent employees.
- \*Contractor's failure to perform duties specified in this agreement.
- \*Failure to comply with any laws.
- \*Acts of dishonesty which are attributable to the Vendor or its employees.
- \*Submitting false or fraudulent information.
- \*Failure of Vendor to perform satisfactorily under this agreement.

# VENDOR ACKNOWLEDGEMENT



This proposal is in response to the University of Montevallo's Request for Proposal for \_\_\_\_\_.

Vendor agrees to perform in accordance with all provisions of the RFP documents and any addenda thereto, except as may be specifically stated in this proposal, at the prices set forth herein.

Vendor agrees that this Proposal is a firm offer to the University of Montevallo which cannot be withdrawn for 120 calendar days from and after the Proposal due date.

Vendor certifies that it has thoroughly examined and fully understands all the provisions of the RFP and the conditions of the contract documents attached thereto, as well as any addenda issued prior to the due date; that it has carefully reviewed and fully supports the accuracy of its

Proposal; has satisfied itself as to the nature and location of all work, the technical, general, and local conditions to be encountered in the performance of any work, the requirements of the Contract and all other matters which may in any way affect performance or the cost thereof; and that the University of Montevallo shall not be responsible for any errors or omissions on the part of the undersigned in preparing this Proposal.

If awarded a Contract, Vendor agrees to execute the Contract and deliver it to the University of Montevallo within 15 calendar days of such award, along with any required certificates of insurance.

Authorized Signatory \_\_\_\_\_

Title \_\_\_\_\_

Company Name \_\_\_\_\_

Date \_\_\_\_\_

Company Address \_\_\_\_\_

Telephone Number \_\_\_\_\_

Federal Taxpayer I.D. Number \_\_\_\_\_

Email Address \_\_\_\_\_

DUNS Number \_\_\_\_\_

# Disclosure Statement

(Required by Act 2001-955)

ENTITY COMPLETING FORM	
ADDRESS	
CITY, STATE, ZIP	TELEPHONE NUMBER (    )
STATE AGENCY/DEPARTMENT THAT WILL RECEIVE GOODS, SERVICES, OR IS RESPONSIBLE FOR GRANT AWARD	
ADDRESS	
CITY, STATE, ZIP	TELEPHONE NUMBER (    )

This form is provided with:

- Contract     
  Proposal     
  Request for Proposal     
  Invitation to Bid     
  Grant Proposal

Have you or any of your partners, divisions, or any related business units previously performed work or provided goods to any State Agency/Department in the current or last fiscal year?

- Yes     
  No

If yes, identify below the State Agency/Department that received the goods or services, the type(s) of good or services previously provided, and the amount received for the provision of such goods or services.

STATE AGENCY/DEPARTMENT	TYPE OF GOODS/SERVICES	AMOUNT RECEIVED

Have you or any of your partners, divisions, or any related business units previously applied and received any grants from any State Agency/Department in the current or last fiscal year?

- Yes     
  No

If yes, identify the State Agency/Department that awarded the grant, the date such grant was awarded, and the amount of the grant.

STATE AGENCY/DEPARTMENT	DATE GRANT AWARDED	AMOUNT OF GRANT

- List below the name(s) and address(es) of all public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

NAME OF PUBLIC OFFICIAL/EMPLOYEE	ADDRESS	STATE DEPARTMENT/AGENCY

2. List below the name(s) and address(es) of all family members of public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the public officials/public employees and State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

NAME OF FAMILY MEMBER	ADDRESS	NAME OF PUBLIC OFFICIAL/ PUBLIC EMPLOYEE	STATE DEPARTMENT/ AGENCY WHERE EMPLOYED
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If you identified individuals in items one and/or two above, describe in detail below the direct financial benefit to be gained by the public officials, public employees, and/or their family members as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

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Describe in detail below any indirect financial benefits to be gained by any public official, public employee, and/or family members of the public official or public employee as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

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List below the name(s) and address(es) of all paid consultants and/or lobbyists utilized to obtain the contract, proposal, request for proposal, invitation to bid, or grant proposal:

NAME OF PAID CONSULTANT/LOBBYIST	ADDRESS
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By signing below, I certify under oath and penalty of perjury that all statements on or attached to this form are true and correct to the best of my knowledge. I further understand that a civil penalty of ten percent (10%) of the amount of the transaction, not to exceed \$10,000.00, is applied for knowingly providing incorrect or misleading information.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Notary's Signature Date Date Notary Expires

*Act 2001-995 requires the disclosure statement to be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of \$5,000.*



**CERTIFICATION OF COMPLIANCE  
WITH SECTION NINE OF ACT 2011-535**

The undersigned officer of \_\_\_\_\_ (Company) certifies to the University of Montevallo that the Company shall not knowingly employ, hire for employment, or continue to employ an unauthorized alien and does attest to such by sworn affidavit signed before a notary. Furthermore, the Company certifies that it has provided its one-page E-Verify Company Profile Document to the University. During the performance of the contract, the Company shall participate in the E-Verify Program and shall verify every employee that is required to be verified according to the applicable federal rules and regulations. The Company also certifies that it will obtain sworn affidavits signed by a notary from any subcontractors furnishing goods/services under this contract attesting to the fact that they do not employ, hire for employment, or continue to employ an unauthorized alien and that they participate in the E-Verify Program and verify every employee that is required to be verified according to the applicable federal rules and regulations.

\_\_\_\_\_  
PRINT COMPANY NAME

\_\_\_\_\_  
SIGNATURE OF COMPANY OFFICER

\_\_\_\_\_  
PRINT TITLE OF COMPANY OFFICER

\_\_\_\_\_  
DATE

Sworn and subscribed to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
NOTARY PUBLIC

My commission expires: \_\_\_\_\_