REQUEST FOR PROPOSAL

Procurement Services
8600 University Blvd
Evansville, IN 47712-3597

Information Technology Asset Management and System Imaging Software

Proposal No:		Return to:
24-12-18039-03170 **Due Date / Time:** 4-02-2024 / 2PM / Local Time		Jeff Sponn, Director of Procurement University of Southern Indiana Procurement (Support Services Building) 8600 University Blvd Evansville, IN 47712 jsponn@usi.edu

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GENERAL INSTRUCTIONS TO PROPOSERS
USI Proposal form must be returned to:
PROCUREMENT, JEFF SPONN
jsponn@usi.edu

- **Late submissions will NOT be considered in bid analysis.**

Questions Due 3-18-2024 / 11AM / Local Time
Jeff Sponn, Director of Procurement
University of Southern Indiana
Email: jsponn@usi.edu

Answers Provided via Addendum by 3-21-2024

Due Date: 4-02-2024 / 2PM / Local Time

Insurance Certificate naming USI as "Additional Insured" and Workers Compensation, coverage is to be included in bid package.

For proposal results please view our website at www.usi.edu/procurement/competitive-bids-and-results

A.   **General Terms and Conditions**

    1.   Prices to include F.O.B. University of Southern Indiana

    2.   Freight or other costs will not be allowed unless included in your proposal.

    3.   Unless otherwise understood, there are no restrictions on the number of items or quantity that may be ordered.

    4.   If alternates are offered, full descriptive information and literature must be submitted with proposal.

    5.   The University of Southern Indiana is a political subdivision of the state of Indiana and is not subject to state sales tax. A tax exemption certificate will be sent upon request.

    6.   Material Safety Data Sheets are to be submitted with your proposal for any applicable items or products.

B.   **Terms/Shipping (VENDOR: PLEASE COMPLETE THE FOLLOWING)**

    1.   Prices are firm for _____ days
    2.   Expected terms are Net 30, if not, please indicate here: _____
    3.   Shipment to be made from _____within_____days

C.   **Minority Business Information (VENDOR: PLEASE COMPLETE THE FOLLOWING)**

    1.   Is your business a certified minority?
              Yes_____   No_____

    2.   If yes, how certified: _____

Company Name: _____

Authorized company signature: _____

Printed name: _____

For questions arising from this proposal request, please complete:

Contact Person Name: _____

Contact Person Email: _____

Contact Person Telephone: _____

Nondiscrimination and affirmative action. This contractor and its subcontractor(s), if any, shall abide by the requirements of Indiana Civil Rights Act, IC 22-9, Executive Order 11246 and the Equal Opportunity clauses as set forth in 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals with respect to his hire, tenure, terms, conditions or privileges of employment or any matter directly or indirectly related to employment, based on their race, color, religion, sex, sexual orientation, gender identity or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, protected veteran status or disability. As used herein, "contractor" shall be deemed to mean "Vendor" or "Supplier" and "contract" shall be deemed to mean this Agreement. The contractor will also comply with all applicable affirmative action reporting requirements. In addition, the contractor shall cause the Equal Opportunity clause references to be included in their subcontracts or purchases orders hereunder unless exempted by rules, regulations and orders of the Secretary of Labor issue pursuant to Section 201 of the Executive Order 11246 and 11375 as amended.

Signature   _____Jeff Sponn_____   **Date: 3-4-24**

            Jeff Sponn, Director of Procurement

University of Southern Indiana

**Information Technology Asset Management and
System Imaging Software**

**REQUEST FOR PROPOSAL
Bid Number 24-12-18039-03170**

**Issue Date: 3-4-2024
Questions Due-Jeff Sponn (jsponn@usi.edu): 3-18-2024 11:00 AM CST
Answers Provided via Addendum by 3-21-2024
DUE DATE: 4-2-2024 2:00 PM CST**

SECTION I: COMPANY INFORMATION, EXPERIENCE, IMPLEMENTATION, AND REFERENCES

1. Introduction:

The University of Southern Indiana (USI) is seeking proposals from qualified vendors for Information Technology Asset Management (ITAM) and System Imaging Software solutions. We are interested in acquiring a comprehensive software solution that will streamline our IT asset management processes, improve efficiency, enhance security, and optimize resource allocation within our organization.

2. Background:
   IT Asset Management (ITAM) practices are essential for our teams to keep manage university owned hardware and software. Accurate tracking and managing of assets helps us make informed decisions, stay compliant with regulations, and reduce security risks. While efficient software imaging makes system deployment easier by simplifying the setup and management of software across different devices.

3. Scope of Work:
   The selected vendor will be responsible for providing Information an ITAM and System Imaging Software solutions. The scope of work includes, but is not limited to, the following:
   a. Conduct a comprehensive assessment of our IT asset, software imaging, software distribution, and software license management. Propose a tailored solution to streamline processes and improve efficiency.
   b. Identifying all servers and workstations within our infrastructure and recording details such as make, model, serial number, specifications, and location.
   c. Help to develop software-based procedures for procurement, deployment, maintenance, and retirement of servers and workstations. As well as for software imaging and deployment.
   d. Oversee the installation, configuration, and integration of the selected ITAM and software imaging solutions with our existing infrastructure. Ensure smooth deployment and functionality.
   e. Provide training sessions for IT administrators and end-users on software usage. Supply comprehensive documentation and user guides for reference.
   f. Offer continuous support and maintenance services post-implementation to address technical issues, updates, and troubleshooting needs promptly.
   g. Integration with our service desk ticketing system (TeamDynamix).

4. Please provide company information:

A	Legal name of company	
B	Operating name of company	
C	Headquarters' street address, city, state, zip code	
D	Mailing address, city, state, zip code (if different from headquarters' address)	
E	Name of primary sales representative	
F	Email of primary sale representative	
G	Phone number of primary sales representative	
H	Name of secondary sale representative	
I	Email of secondary sales representative	
J	Phone number of secondary sales representative	

K	Year company was established	
L	Number of offices	
M	Total number of employees	
N	Total number of full-time customer service and/or technical support representatives	
O	Total number of full-time training representatives	
P	Average tenure of employees with company	

5. Has the company been involved in a merger or been acquired by another business entity in the past? If yes, please provide details including the year, name of business(es) involved, and how customer relationships were maintained throughout the transition.

6. Is the company currently for sale or involved in any transaction to expand through acquisition or merger, or to be acquired by another business entity? If yes, provide a statement explaining the impact both in organizational and directional terms.

7. Does any relationship exist, whether by relative, business associate, capital funding agreement or any other such kinship, between the company and any employee of University of Southern Indiana (USI)? If yes, provide a statement of disclosure. All such disclosures will be subject to administrative review and approval prior to entering into any contract with USI.

8. Does the company agree that the submitted proposal contains accurate information, constitutes an offer to USI, and shall be valid for a period of 120 calendar days after the date of submission?

9. Please provide brief history of company (in 250 words or less).

10. Please provide primary strengths that differentiates the company from competition (in 250 words or less).

11. Please provide number of total customers using your solution.

12. Please provide a listing of your current higher education customers.

13. How would your largest customer rate their satisfaction with your system and your support versus your smallest customer?

14. Please describe the process for onboarding a new client, including average length of time for completion.

15. Please describe the company's recent experience with onboarding for a similarly sized (or larger) higher education institution.

16. Does the company have the time and the resources to onboard a new client within 90-120 days of the contract award?

17. Please provide details of Information Security framework standards. Are they verified by a certified external party (SOC 2 Type II, Penetration Testing, ISO Certified)? Outline any applicable regulatory compliance requirements your organization compiles with (HIPAA, GLBA, PCI, GDPR, FERPA). Has there been any identified or reported information security breach in the last 5 years?

18. Please provide a list of at least three organizational references, preferably other higher education institutions with programs of similar size and scope to USI.

A	Organization's Name	
	Headquarters' street address, city, state, zip code	
	Mailing address, city, state, zip code (if different from physical address)	
	Name of primary contact	
	Email of primary contact	
	Phone number of primary contact	
	Customer since (date)	
	Approximate number of programs per year	
	Approximate number of participants served per year	

B	Organization's Name	
	Headquarters' street address, city, state, zip code	
	Mailing address, city, state, zip code (if different from physical address)	
	Name of primary contact	
	Email of primary contact	
	Phone number of primary contact	
	Customer since (date)	
	Approximate number of programs per year	
	Approximate number of participants served per year	

C	Organization's Name	
	Headquarters' street address, city, state, zip code	
	Mailing address, city, state, zip code (if different from physical address)	
	Name of primary contact	
	Email of primary contact	
	Phone number of primary contact	

Customer since (date)	
Approximate number of programs per year	
Approximate number of participants served per year	

SECTION II: Software Features and Tech Support

1. Product Features and Capabilities:
   - What are the key features and functionalities of your ITAM solution?
   - How does your product handle inventory tracking, software license management, and hardware lifecycle management?
   - How does your product handle software imaging?

2. Integration and Compatibility:
   - Can your ITAM solution integrate with existing IT systems and tools (e.g., ITSM platforms, CMDBs, TeamDynamix)?
   - How easily can your product adapt to our organization's infrastructure and technologies?

3. Scalability and Flexibility:
   - How scalable is your ITAM solution, and what is the maximum capacity it can handle?
   - Does your product offer customization options to accommodate unique organizational needs?

4. Security and Compliance:
   - What security measures are in place to protect sensitive asset data?
   - How does your ITAM solution ensure compliance with industry regulations and standards (e.g., GDPR, HIPAA, FERPA)?

5. Reporting and Analytics:
   - What reporting capabilities does your product offer?
   - Can your ITAM solution provide insights and analytics to optimize asset utilization and cost management?

6. Support and Training:
   - What levels of support do you offer, and what are the response times for support requests?
   - Do you provide training and resources to help users effectively utilize your ITAM solution?

7. Product Roadmap and Future Developments:
   - What new features or enhancements are planned for future releases of your ITAM

solution?

- How do you gather feedback from customers to drive product improvements?

8. Implementation Process:
   - What does the implementation process typically entail, and how long does it take to deploy your ITAM solution?
   - Do you provide professional services or assistance to ensure a smooth implementation?

SECTION III: PRICING/FEE SCHEDULE

1. Please indicate how fees are determined. Indicate if this is an annual fee, a fee per ticket, a per transaction fee.

2. Please indicate add-on service(s) and their fees to allow for additional review of optional offerings (if applicable).

3. Please indicate upgrade fees (if applicable).

4. Please indicate training fee schedule (if applicable).

5. Please indicate reporting/administrative applications fees (if applicable).

6. Please indicate any other fees associated with your service that are not stated here.

7. How often, on average over the past 5 years, has your pricing schedule changed? What was the average percentage increase/decrease?