Mt. San Antonio College
1100 N. Grand Avenue
Walnut, CA 91789

Request for Proposals

for

Electronic Catalog Management Software Services
RFP #2998

Issued: November 2014

Due: December 18, 2014
Request for Proposals

Electronic Catalog Management Software Services

The Mt. San Antonio Community College District is seeking proposals from qualified firms, partnerships, corporations, associations, or professional organizations to provide Electronic Catalog Management Software Services. Selection will result in an Agreement expected to provide comprehensive professional services to the District beginning March 12, 2015.

If you would like to submit a response to this Request for Proposal (RFP), please send eight (8) hard copies and one (1) electronic copy of the requested materials to:

Mt. San Antonio College
Purchasing, Building 4 - Room 1385
1100 N. Grand Avenue
Walnut, CA  91789

Questions regarding this RFP may be directed to Teresa Patterson, Purchasing Manager, via email at tpatterson@mtsac.edu. Firms/individuals must confirm an interest in providing a submittal by emailing Teresa Patterson by the date identified in the RFP schedule.

The District may modify the RFP prior to the deadline for submittals by issuance of an electronic addendum on the District bid website at www.mtsac.edu.

All responses must be received by the Purchasing Department by

2:00 p.m., December 18, 2014

INTRODUCTION

Mt. San Antonio College seeks to procure an electronic catalog management software system that utilizes the following functions: manage the entire catalog process online; integrate with Banner and WebCMS; 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; integrate 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 8. The selected team will work with the Information Technology Advisory Council (ITAC); 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 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 university and a minimum of one Southern California community college.

It is the intent of this RFP to establish the specifications, terms, and conditions governing the selection process.

BACKGROUND

Mt. San Antonio College is among the largest of California’s 112 community colleges. Located in the city of Walnut, Mt. SAC serves nearly 20 communities and a million residents in the San Gabriel Valley. Since the College opened its doors in 1946, Mt. SAC has provided quality and affordable educational opportunities to more than a million students of all ages. Today, the College offers more than 200 degree and certificate programs and has earned statewide and national distinction in a number of disciplines. Our alumni have distinguished themselves in both the private and public sectors.

Additional detailed information regarding the College is available at http://www.mtsac.edu/about.

SUBMITTAL INFORMATION AND SUBMITTAL SCHEDULE

All submittals shall be in the form and formatted as specified in this RFP. 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.

Time is of the essence. Submitting Firms will be expected to adhere to the required dates and times. The RFP 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 Teresa Patterson via email at tpatterson@mtsac.edu with the subject line indicating “Question(s) for Electronic Catalog Management Software Services RFP”. If questions are submitted after the deadline, they will not be answered and firms must provide a submittal using the information in the RFP and any addenda provided.

Request for Proposals Submittal Schedule

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email confirmation of interest</td>
<td>November 25, 2014</td>
</tr>
<tr>
<td>Submit written questions</td>
<td>December 2, 2014</td>
</tr>
<tr>
<td>Last Addendum Issued</td>
<td>December 10, 2014</td>
</tr>
<tr>
<td>Proposals Due</td>
<td>December 18, 2014</td>
</tr>
<tr>
<td>Proposals Reviewed by Committee</td>
<td>December 19, 2014 – January 9, 2015</td>
</tr>
</tbody>
</table>
During review of submittals, Mt. SAC 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 RFP 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 or other potential obstacles to reaching the delivery location in a timely manner.

**SCOPE OF WORK**

Mt. San Antonio College is 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 Banner and Web CMS. 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 a 16 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 hours a day, seven days a week
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
n. Ability to print web pages as well as PDF files.

Schedule:

The Electronic Catalog Management Software Services are expected to begin upon Board approval at the March 2015 Board meeting and be fully implemented no later than August 2015.

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 ITAC 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 one 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 into software
e. Review of template sample files and website template and ability to modify as needed
f. Publish
g. Final acceptance by college and ITAC
h. Dedicated catalog editor to fine tune layout before presenting for review
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 PROPOSALS

Firms shall submit eight 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.

All submittals shall be in the form and formatted as specified in this RFP. 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.

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 Mt. San Antonio College. (two page maximum)

4. **Experience.** Provide any professional registration, certifications, and affiliations for the firm. Describe your experience providing similar services to institutions of higher education, specifically California community colleges. 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.

   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. **Financial Standing.** Provide a current annual report or audited profit and loss statement and the amounts and carriers of both general and professional liability insurance.

6. **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
      
      iii. Have a minimum of three years of directly related experience
d. Include resumes of proposed personnel, including any proposed sub-
consultants who are likely to be assigned to the project. 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.

7. **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)

8. **Additional Data.** Provide additional information about the firm as it may relate to
this RFP. Indicate ongoing professional education of staff and total number of
permanent employees.

9. **Professional Fees.** Provide with your proposal, one copy of an itemized fixed
fee in a sealed envelope. 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
service 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 the District, subsistence, lodging, fuel charge, vehicle
use, transmitting reports, administrative charges, or other similar activities
necessary for performance of the services for Mt. San Antonio College.

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

- Principal
- Lead- Project Manager/Evaluator
Identify any constraints or assumptions that affect the proposed fee. Services that are not specifically included in the RFP 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. **Statement of Compliance.** Complete and provide authorized signature on the Statement of Compliance enclosed with this RFP.

Responses to the RFP 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 RFP may result in 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 award of a contract, if any, as a result of this RFP will be made to one of the three lowest responsive and responsible vendors, in accordance with Education Code Section 81645. Mt. San Antonio College reserves the right to accept or reject proposals on each item separately or as a whole, to reject any or all proposals without penalty, to
waive any informalities or irregularities therein, and to contract as the best interests of the College may require in order to obtain service requirements which best meet the needs of Mt. San Antonio College.

Electronic Catalog Management Software Services will be selected on the basis of criteria regarding qualifications, experience, and demonstrated competence. Mt. San Antonio College reserves the right to award a contract to the proposal, which best serves the needs of the College as determined by the committee, including consideration of fair and reasonable pricing. Mt. San Antonio College also reserves the right to reject any and all proposals.

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 Mt. San Antonio College rejects all proposals.

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

**MISCELLANEOUS**

1. General information about Mt. SAC may be found at [http://www.mtsac.edu](http://www.mtsac.edu). Recent projects are listed at [http://www.mtsac.edu/purchasing/bid_info.html](http://www.mtsac.edu/purchasing/bid_info.html).

2. All submittals shall remain active and valid for ninety (90) 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, or request product demonstrations 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 Proposal materials.

5. All materials, except financial information, submitted in response to this RFP shall become the property of Mt. SAC and shall be considered a Public Record. The District reserves the right to reject any or all responses to this RFP. Any and all costs incurred in preparing and submitting a response to this RFP 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 RFP 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: Statement of Compliance
2. Exhibit B: Sample fee schedule for extra work

*Proposal shall be received up to but not later than 2:00 pm, on the date listed in the schedule.*
Exhibit A

Statement of Compliance
Electronic Catalog Management Software
(RFP #2998)

Sealed Proposals: All proposal sheets and this original acknowledgement form must be executed and submitted under sealed cover. The face of the cover must contain, in addition to the address, the date and time of the proposal opening and the proposal number. All proposals are subject to the conditions stated within the RFP. Proposal must contain a manual signature of authorized representative in the space provided below. Proposals must be typed or printed in ink. Use of erasable ink is not permitted. All corrections made to the attached proposal must be initialed. The company name must appear on each page of the proposal. Each page of the proposal must be sequentially numbered. Proposals that do not follow the outline in the section titled Format for Proposals, or proposals submitted with incomplete information, may be considered non-responsive and lead to disqualification. Original and eight (8) copies of the proposal must be provided.

I certify by my signature below that I have been given Mt. San Antonio Community College District’s RFP #2998, and the instructions for submitting a proposal. I further certify that I am authorized to bind the Firm noted in this submittal in response to this request and that I am authorized to commit the Firm to the submittal, and will submit said proposal prior to 2:00 p.m., December 18, 2014.

I acknowledge the following addenda(s)_______________________

Firm Name:___________________________________________________________________

Firm’s Address:________________________________________________________________

Phone:____________________________________Fax:_______________________________

Contractor’s License No. ________________________________________________________

E-Mail:______________________________________________________________________

_________________________________________________

Printed Name/Title_________________________________________________

Signature_________________________________________________

Statement of Compliance must be completed and submitted along with the RFP, otherwise bidders submission will be considered non-responsive.
Exhibit B

Criteria and Billing for Extra Work [SAMPLE]

Electronic Catalog Management Software
(RFP #2998)

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 (CPI) for the previous twelve month period, using the CPI for the geographical area of the Consultant.

<table>
<thead>
<tr>
<th>Consultant Services</th>
<th>Fee Per Hour</th>
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<tbody>
<tr>
<td>Principal</td>
<td>$XXX</td>
</tr>
<tr>
<td>Associate</td>
<td>$XXX</td>
</tr>
<tr>
<td>Project Manager</td>
<td>$XXX</td>
</tr>
<tr>
<td>Special Services: CEO/Principal Consultant</td>
<td>$XXX</td>
</tr>
<tr>
<td>Clerical</td>
<td>$XXX</td>
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</tbody>
</table>