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**C O N F I D E N T I A L**

**THIS IS AN INVITATION TO BID ONLY**

**Harvard Contact:**

**Name**

**Title**

**School/Unit**

**Address**

**first\_last@harvard.edu**

**Phone (optional)**

1. About Harvard University:

Harvard University (“Harvard”) consists of 11 principal academic units – ten faculties and the Radcliffe Institute for Advanced Study including several research institutions and museums. In addition, Harvard has affiliated relationships with numerous organizations including thirteen area hospitals and research institutions through its Medical School. Harvard is large, diverse, and highly decentralized. There are over 500 buildings located on 380 acres of land on three primary campuses: Harvard and Radcliffe campuses in Cambridge, the Longwood area (Harvard Medical School, Harvard T.H. Chan School of Public Health, and Harvard School of Dental Medicine) in Boston, and the Harvard Business School campus in Allston. Other Massachusetts facilities include the Arnold Arboretum in Jamaica Plain, the Harvard Forest in Petersham, and the Harvard Book Depository. The University has more than 20,000 full-time degree candidates and over 13,000 employees, including 2,300 faculty members. Harvard’s annual operating budget exceeds $4.2 billion. For more information, see www.harvard.edu.

1. Project Overview

Harvard invites your company (“Vendor”, “you”, “your”) to participate in a Request for Proposal (“RFP”) for Harvard. As a recipient of this RFP, you have been selected to submit a comprehensive solution, work plan, and pricing (collectively, the “Proposal”) that meets all Harvard requirements and satisfies the terms of this RFP for [Sourcing Manager – INSERT PROJECT NAME] (the “Project”). Requirements not satisfied in the Proposal, must be expressly indicated as aspects of non-compliance.

Vendors are expected to provide a Proposal for those goods and/or services included in the specifications of this RFP, which they can supply in a manner consistent with Harvard’s strategic goals relative to the Project. Specifications can be found in [Sourcing Manager – add ATTACHMENT NAME IF APPLICABLE].

To be selected, you must provide extremely competitive pricing that demonstrates “Most Favored Customer” consideration or GSA pricing. Your Proposal should include an appropriate mechanism to ensure that the pricing remains best-in-market over time.

Further it is expected that you include a commitment to work with Harvard to deliver consistent, comprehensive solutions, providing high quality, cost effectiveness, and a reduction of risk.

1. RFP General Rules and Guidelines
   1. Communications with Harvard

IMPORTANT: In order to preserve the fairness to all parties participating in this RFP, you are not authorized to communicate with Harvard personnel regarding the status of this RFP, Harvard’s decision, or other questions related to the RFP process other than as expressly permitted by this Section. Violation of this Section may be grounds for Harvard to disqualify a Vendor. All communications related to this RFP must be directed to Harvard’s Sourcing Manager listed in this RFP.

* + 1. **Questions**

Any questions regarding this RFP must be submitted to the Harvard Sourcing Manager, and in accordance with the “Q&A Period(s)” detailed in the Timeline section below. Harvard reserves the right, in its sole discretion, to select the questions to which it will respond, the questions that will be edited, and the questions and responses it will share with othervendors. Questions will not be taken or answered in any other manner.

* + 1. **Existing Business**

This RFP does not restrict your day-to-day business with Harvard to facilitate pre-existing business matters. Any communications regarding this RFP outside the approved proposal process specified in this RFP shall not be authorized or binding on Harvard.

* + 1. **Non-Use of Harvard Name**

Vendor shall not furnish the names, trademarks or proprietary indicia of Harvard as a reference, or in any advertising, announcement, press release or promotional materials, including testimonials, quotations, case studies, and other endorsements.

* 1. Timelines

Your delivery of any questions and your actual Proposal must be in compliance with the timetable of this RFP and must be received by Harvard no later than the following dates and times:

|  |  |
| --- | --- |
| RFP Key Activity Timeline | Date |
| Receipt of Fully Executed Harvard Non-Disclosure Agreement ***(If you have not already submitted this to the above Harvard Contact, you must stop now and complete that step.)*** | [Sourcing Manager – INSERT DATE] |
| Harvard Distribution of the RFP to Vendors | [Sourcing Manager – INSERT DATE] |
| Vendor’s Intent to Bid Due Back to Harvard | [Sourcing Manager – INSERT DATE] |
| Q&A Period Begins | [Sourcing Manager – INSERT DATE AND SPECIFIC TIME] |
| Q&A Period Closes | [Sourcing Manager – INSERT DATE AND SPECIFIC TIME] |
| Vendor’s Responses Due Back to Harvard (“Proposal Due Date”) | [Sourcing Manager – INSERT DATE AND SPECIFIC TIME] |
| Expected date for Harvard’s Evaluation of Vendor’s Responses | [Sourcing Manager – INSERT DATE] |
| Vendor’s oral presentations | [Sourcing Manager – INSERT DATE] |
| Expected Award Date | [Sourcing Manager – INSERT DATE] |

* 1. General Rules for Proposals
     1. **All information is confidential**

This RFP must be treated as confidential pursuant to the Non-Disclosure Agreement executed by Vendor and Harvard. ***(If you have not already submitted the Non-Disclosure Agreement to the Sourcing Manager, you must stop now and complete that step.)*** Vendor shall not disclose the fact that it has been invited to submit a Proposal. All information communicated to you by Harvard related to this RFP will be for the sole and exclusive purpose of enabling you to submit a Proposal. The information contained in the RFP, and the RFP itself, remain the property of Harvard and shall not under any circumstances, be disclosed by Vendor, in whole or in part, to any third parties without the prior written approval of Harvard.

* + 1. **Receipt of a Proposal does not obligate Harvard in any way**

The submission, receipt and review of your Proposal do not obligate Harvard in any way. Harvard makes no representation, implied or express, that it will accept or approve any proposal submitted. This RFP is not an offer by Harvard, but is intended solely for information and review purposes and as an invitation to bid.

* + 1. **Vendor bears the responsibility to cover cost pursuant to preparing the Proposal**

It is your responsibility to obtain, at your sole expense, all information necessary for the preparation of a Proposal. Harvard is not liable for any costs incurred by any vendor in the preparation, presentation or any other aspect of the proposal received by reason of this RFP.

* + 1. **Awarding business based on this RFP is at the sole discretion of Harvard**

In submitting a Proposal, you understand that Harvard will determine in its sole discretion which Proposal, if any, is accepted. Harvard may request additional data, discussion, or presentations in support of the Proposal.

Harvard is under no obligation to award business on the basis of this RFP, and is not obligated to explain its rationale for the selection or elimination of you or any other vendor or prospective vendor. Harvard may, at its sole discretion, award business in part or in whole to a vendor(s) based on the Proposals submitted in response to this RFP. Alternatively, the result of this RFP could be the selection of several finalist vendors who will compete for the right to assist Harvard in implementing the Project.

* + 1. **Negotiations**

Harvard, in its sole discretion, reserves the right to select and negotiate with those vendors it deems qualified and to terminate negotiations without incurring any liability. Or, Harvard may continue negotiations with one or more vendors related to issues that may or may not be included in this RFP.

* + 1. **This RFP does not guarantee any future volumes**

Harvard makes no guarantee of future volumes and offers this information only to assist vendors in preparing proposals. Harvard will not mandate that departments use the selected Vendor(s). Capturing market share will be the Vendor's responsibility and will depend on the Vendor's ability to market and deliver an attractive package of price, service, and products that will motivate users to change existing practices. Harvard is committed to providing active support and will work closely with the selected Vendor(s) to achieve the aims of this Project.

* + 1. **Vendor rights for damages related to this RFP**

You waive any right to claim damages of any nature based on the selection process, final selection, and any communications associated with the selection and/or Harvard deliberation.

* + 1. **Vendor is bound by its proposal for 180 Days**

In your Proposal, you must submit your best bid in response to this RFP, and shall be bound by your Proposal, in all respects, for a period of one hundred eighty (180) days after Proposal Due Date.

* + 1. **Intend to Bid**

You must respond to Harvard that you “**Intend to Bid**”. If you do not respond to this question, Harvard may, in its sole discretion, remove you from the distribution list for this project and/or future projects.

* + 1. **Harvard Agreement terms and conditions**

The terms and conditions of this RFP and the completed Proposal(s) submitted by the selected vendor(s) will become, at Harvard’s sole discretion, part of the Agreement (as defined below) between Harvard and the respective selected vendor(s).

* + 1. **Bid Evaluation**

Proposals may be reviewed and evaluated by any person at the discretion of Harvard, including third parties under non-disclosure obligations engaged by Harvard; however, your Proposal(s) will not be visible to your competitors. Proposal evaluations will be based on all elements of each response, including value-add and intangible factors, as well as Harvard’s assessment of your ability to meet your stated commitments.

* + 1. **Insurance and Indemnification**

Among other terms, you shall be required to comply with all of the insurance and indemnification terms, conditions and requirements set forth in the Agreement.

* + 1. **Format for Proposal**

Your Proposal must be submitted in accordance with the instructions in this RFP and must include all information and materials requested in the RFP. If your Proposal does not follow this format, or does not contain the information requested, Harvard may reject it without review.

You may include, in addition to the information and material requested by this RFP, additional information and material, including information that you reasonably believe will improve the goods and/or services suggested by you in the Proposal described in this RFP, if both of the following conditions are satisfied:

(a) You have fully responded in detail to all questions and issues raised in this RFP, and

(b) You have clearly identified such additional information in a separate attachment to the Proposal and labeled it as a supplementary or alternative service or feature. Any such attachment must identify the applicable RFP section or subsection to which it responds. Such attachment may be incorporated by reference into, and made a part of, the Proposal.

[Sourcing Manager – Hard copies are optional. Remove this sentence if you don’t need them.] You must submit [Sourcing Manager – INSERT #] hard copies of your Proposal. In addition, you must submit a soft copy of your Proposal to the Sourcing Manager. You will be notified of the distribution procedures for the hard copies prior to the Proposal Due Date. [Sourcing Manager – MAKE SURE YOU FOLLOW UP WITH THIS INFORMATION TO THE VENDORS]

All Proposals must be organized to follow the format of this RFP. That is, when framing responses to this RFP, all you must use the same section/subsection designations. You must respond to all questions posed by Harvard. The soft copy of your proposal must be provided in an editable Microsoft Office formats (Microsoft Word, Microsoft Excel and Microsoft PowerPoint where applicable).

* 1. RFP Contractual Requirements
     1. **Existing Agreements**

You agree that by submitting a proposal any/all existing contractual agreements you and your affiliates, parent or subsidiaries have with Harvard shall automatically be amended to give Harvard the right to terminate the agreement(s) for convenience with thirty (30) day notice and no penalty or termination cost . This requirement will apply only to those contractual agreements that the vendor contracting entity may have with Harvard that includes any products, services, or subject matter included in this RFP.

* + 1. **New Agreements**

Harvard will require the selected vendor(s) to sign a contract before services commence. There are two (2) main components of a Harvard master services agreement:

* + - 1. **Master Agreement**

Harvard will require selected vendors to sign a master services Agreement (“Agreement”) that defines the legal terms and conditions of the contractual relationship between the parties. The Agreement is provided as a separate attachment [Sourcing Manager – add the Agreement as an attachment] to this RFP. Please review the Agreement carefully and provide your comments, if any, in (“red-line”) format (changes tracked). Note: Harvard may not consider additional requests made after you submit your Proposal.

If changes to the Agreement are requested, failure to provide a redlined version of the Agreement may result in a disqualification of your bid. The Agreement does not create an obligation for Harvard to purchase products or services from you (i.e., no volume, share or revenue commitment exists). [Note: Harvard may revise this Agreement based on any of Harvard’s new requirements at the time of contracting.]

*It is important to note:* Any suggested changes that you request will require review and approval by Harvard. The amount of and degree to which the requested changes are made may cause delay and/or discourage Harvard from doing business with you. Please consider this if you decide to propose any changes to the original Agreement.

* + - 1. **Statement of Work**

Harvard will require selected vendors to sign a document that defines the commercial terms and conditions (e.g., pricing, service levels, delivery expectations, and other requirements) of the specific products and services being bid. This document is referred to as a “Statement of Work” and terms of the Agreement will be deemed incorporated into that Statement of Work by reference, so that the two documents together are the agreement between the parties with respect to the subject matter of this RFP. The Statement of Work will be developed based on the Proposal and this RFP.

1. General Questions

[Sourcing Manager – Add questions as needed and remove those questions that are not applicable.]

* 1. Organization Structure

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Provide the legal name and address information for the legal entity that will be signing the contract. |  |
|  | State your Headquarters location and presence of regional offices. Please include your primary markets, i.e., regional, national, worldwide. |  |
|  | Provide a link to your company's website. |  |
|  | List the name, job title, phone number, email, and mailing address of the primary Harvard liaison for your company. |  |
|  | If the primary contact for this RFP is not the person listed in the above question, please provide the name, job title, phone, and email address of this person |  |
|  | Is your company publicly or privately held. If publicly held, please provide the exchange where stock is traded and symbol. |  |
|  | If applicable, provide a description of your Parent company and its subsidiaries and your Parent company’s headquarters location. Please include any merger, acquisition and divestiture activities during the past three years. |  |
|  | What is the timeline of your fiscal year? |  |
|  | How many years has the entity providing the product/service been in business? |  |
|  | How many years has the entity providing the product/service been providing the product/services requested for this Project? |  |
|  | Please attach information detailing your organizational structure, including the following: [Sourcing Manager – Insert as required here] |  |

* 1. Financial Stability

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Provide your Dun and Bradstreet number if available. |  |
|  | Please include the previous three (3) years audited financial statements, including the Balance Sheet, Income Statement, and Statement of Cash Flows for the previous two (2) fiscal years and for any completed fiscal quarters in the current calendar year or provide links to your annual financial report. |  |

* 1. Market Share

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | List the percentage market share of the top five providers of the products or services being bid in this RFP using the latest available data. Please note the source of your market share data in your response. |  |
|  | List your market share over the past three years. |  |
|  | List your forecasted share over the next two years. |  |
|  | Do you currently supply other Higher Education or Non-Profit Institutions? |  |
|  | If you are a present vendor at Harvard, list the departments and/or schools that you currently supply. |  |

* 1. References

Please provide three references for your major accounts to whom you provide services/products similar to those contemplated by this RFP. If possible, include at least one reference from higher education. If applicable, please explain why former higher education accounts were not retained.

* + 1. **Major Current Accounts:**

Current Major Accounts - Reference #1

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Reference Name |  |
| Reference Phone |  |
| Reference Email |  |
| Reference Complete Address |  |
| Nature of Goods and/or Services Provided |  |
| Annual Billings |  |

Current Major Accounts - Reference #2

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Reference Name |  |
| Reference Phone |  |
| Reference Email |  |
| Reference Complete Address |  |
| Nature of Goods and/or Services Provided |  |
| Annual Billings |  |

Current Major Accounts - Reference #3

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Reference Name |  |
| Reference Phone |  |
| Reference Email |  |
| Reference Complete Address |  |
| Nature of Goods and/or Services Provided |  |
| Annual Billings |  |

* + 1. Former Accounts:

Former Accounts - Reference #1

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Reference Name |  |
| Reference Phone |  |
| Reference Email |  |
| Reference Complete Address |  |
| Nature of Goods and/or Services Provided |  |
| Last Annual Billings |  |
| Circumstances |  |

Former Accounts - Reference #2

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Reference Name |  |
| Reference Phone |  |
| Reference Email |  |
| Reference Complete Address |  |
| Nature of Goods and/or Services Provided |  |
| Last Annual Billings |  |
| Circumstances |  |

Former Accounts - Reference #3

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Reference Name |  |
| Reference Phone |  |
| Reference Email |  |
| Reference Complete Address |  |
| Nature of Goods and/or Services Provided |  |
| Last Annual Billings |  |
| Circumstances |  |

* 1. Top Three Customers

Please list your top three customers and the percentage of your sales attributable to each.

Top Customer - #1

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Percentage of Total Sales |  |

Top Customer - #2

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Percentage of Total Sales |  |

Top Customer - #3

|  |  |
| --- | --- |
| Company Name |  |
| Company’s Industry |  |
| Percentage of Total Sales |  |

* 1. Proof of Insurance

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
| **4.6.1** | Please provide proof of insurance coverage for your business operations. |  |

* 1. Document and Data Security

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Has your company ever participated in a risk assessment with an independent organization such as a public accounting firm? If yes, please indicate when, with whom and conclusions reached? |  |
|  | Does your company have a formal policy and procedure for document retention (Detailing the timeframes certain types of documents must be retained)? If yes, please attach a copy of your policy and procedure. |  |
|  | Does your company have a formal policy and procedure documenting controls for the handling of secure information (Confidential / Personal / Proprietary / etc.)? If yes, please attach a copy of your policy and procedure and define the security measures that are in place to protect customer data. |  |
|  | Provide a complete description of your network as it relates to connectivity with clients. |  |
|  | Has your company experienced an actual or suspected security breach or unauthorized access? |  |

* 1. Risk Management Practices

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Does your company conduct periodic risk and control self-assessments? If yes, what is the frequency they are performed and describe process for remediating deficiencies resulting from these assessments? |  |
|  | If applicable, explain process for monitoring fraud activity and notifying clients of suspected activity? |  |
|  | Describe controls in place to ensure your compliance with all laws and governing regulatory requirements for this product/service. |  |

* 1. Human Resources

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Please describe your performance/incentive award programs behind individual award decisions for the staff directly providing the product/service (This only applies if your staff will directly interact with Harvard clients. Include any sales targets, volume incentive awards, etc.) |  |
|  | Are any of your major shareholders partially or fully employed by Harvard? |  |
|  | Please describe your process for performing background checks prior to on boarding new employees? |  |
|  | Please describe your training process for new employees? |  |
|  | How many employees does your company have? |  |

1. Service and Delivery
   1. Quality

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Describe your quality programs (e.g., ISO9000, CMMI assessments) and quality control procedures (e.g., SAS70). List any quality awards, certifications, standard levels met |  |
|  | Please attach the documents/ images of the documents for your Quality programs, e.g., ISO9000, CMMI |  |
|  | Do you have a customer satisfaction program? If yes, please describe |  |
|  | Will you be able to provide reporting on the number, and process for handling, escalation and resolution of any Harvard customer complaints? |  |

* 1. Business Continuity Plan

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Please attach a document to describe your Business Continuity Plan (“BCP”) with respect to the services and/or products for which you are making a proposal. The BCP described should be a service included in the price structure proposed below. Please provide information regarding programs in place in the event that you experience a disaster (e.g., redundant equipment, alternate facilities). |  |
|  | Please provide information regarding programs in place to aid Harvard in the event that Harvard or you experience a disaster. |  |

* 1. Service Level Agreements (“SLA”(s))

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Please include specific performance metrics that allow Harvard to measure the timeliness and success of varying levels of criticality related to individual services, products, and specific remedies available, including compensation to Harvard, if you do not meet those metrics. Include how you track this with examples (e.g., reports, tools, benchmarks used). |  |

1. Legal Disclosure

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Please attach past or present legal action legal action over the last 3 years (whether civil, criminal or administrative, and whether brought by governmental, association or industry oversight entities or by private sector entities or individuals, regardless of jurisdiction, venue or forum) with regard to any material matter involving your (including any predecessor in interest and/ or any of your employees or independent contractors) business operations, use or development of programs, use or modification of hardware or equipment, provision of a system or services, intellectual property, maintenance or updates. You must give complete details, including final disposition of any such action. |  |
|  | Please attach information relating to any breach of confidentiality or alleged breach of confidentiality by you or any independent contractor you have engaged. |  |
|  | **Current Agreement:**  Please attach information relating to whether you or your parent company, affiliate or subsidiary has an existing contractual agreement with Harvard. Please list the full legal name of the contracting entities, the product or service referenced in the agreement, the term of the agreement (effective date and expiration date) and the Harvard customer who executed the agreement and the respective Harvard relationship manager. |  |

1. Sustainability Commitment

Harvard is an internationally recognized leader in building and operating a healthy, sustainable campus. The Harvard Sustainability Plan sets clear goals and priorities for best practices in sustainable operations and practices that increase energy efficiency, reduce waste, conserve resources, and avoid hazardous materials. We expect our vendors to meet this high level of commitment to sustainability, healthy materials, and environmental responsibility. For more information on Harvard’s sustainability commitment, visit http://green.harvard.edu/.

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Please detail how you will assist Harvard in achieving its sustainability goals, including how you will help the University continually improve its commitment to sustainability if you were to be selected as part of this RFP. What specific tools and resources can you provide to Harvard to strengthen its sustainability commitment? |  |
|  | Please detail your corporate sustainability goals and policy, including efforts to review and improve supply chain, materials, and operational practices. |  |
|  | Please list any recent awards and/or certifications Vendor has received pertaining to environmental issues. |  |
|  | Please explain any active lawsuits that have been filed against Vendor in connection with climate, sustainability, or environmental issues. |  |

1. Minority, Women, Veteran, Service Disabled Veteran, and Small Business Enterprises

Harvard University is committed to supporting Small Businesses Harvard encourages vendor(s) to provide maximum practicable opportunities to include small business subcontractors and vendors among their sources of supply. We encourage qualifying vendors to get certified by the appropriate certification agency(ies) and register with SAM (https://www.sam.gov/portal/SAM/#1)

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Are you certified as a:  Woman Owned Business  Minority Owned Business  Veteran Owned Business  Service Disabled Veteran Owned Business  Small Disadvantaged Business (8a)  Hubzone Small Business  Other, please explain |  |
|  | Please submit a copy of the applicable certification and include all NAICS codes (if applicable) |  |
|  | Does Vendor currently have a formal Vendor Diversity Program? If yes, please describe how the program works |  |
|  | Vendor(s) typically report on a quarterly basis the dollar amounts paid to minority/woman and other classification subcontractors and vendors s for material and services used in the performance of agreements. Do you agree, if selected, to proactively provide such reporting? |  |
|  | If Vendor does not have a formal MWBE Program, do you actively seek to do business with minority and women-owned companies? If so, please provide a brief description of how Vendor makes use of MWBE and Diverse Contractors/Vendors. |  |
|  | Current dollar and percentage values of spending with diverse companies that you engage as contractors / vendors? | **\_\_\_\_\_%**  **$\_\_\_\_\_** |

1. Accessibility

Harvard University Disability Services (UDS) welcomes students, faculty, staff and visitors with disabilities. UDS provides leadership to University efforts to ensure an accessible, welcoming working and learning environment for individuals with disabilities while ensuring compliance with federal and state regulations. (<http://accessibility.harvard.edu/>)

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Please submit a separate attachment responding to each applicable section of the Voluntary Product Accessibility Template (VPAT), describing the compliance of the Product/Service with Section 508 of the Rehabilitation Act. The VPAT and related information are available at www.itic.org/policy/accessibility. |  |
|  | Provide a copy or Vendor’s policy or commitment statement regarding accessibility. |  |
|  | Please provide contact information of the person(s) in your company responsible for the accessibility policy and compliance. |  |
|  | Please describe the accessibility group, team or function within your company that is responsible for technical development, if applicable. |  |
|  | Describe how Vendor achieves compliance with IT accessibility standards or requirements. |  |
|  | Please describe the testing protocols used by Vendor to assess the accessibility of the Product/Service. |  |
|  | Specify whether Vendor is willing to provide demonstrations of the accessibility of the Product/Service. |  |
|  | Please describe how your company assures the Product/Service remains current with accessibility best practices and legal requirements. |  |

1. Business Requirements
   1. [Sourcing Manager – Think about and document the following:

|  |  |
| --- | --- |
| Assumptions | Make a list of all the assumptions that the business and/or Sourcing is making.  Understand all assumptions that may impact competition, etc. |
| Understand the Good and/or Service | What is the story?  How is the good and/or service being used?  How is it made?  Is the product or service new?  When was the last time this was sourced?  Are there any performance issues with the product and/or service?  Volume aggregation?  Vendor consolidation?  What is your competitive lever? |
| Understand the Baseline | Quantity?  Volume?  Unit of measure?  Is the baseline changing up or down?  Gather physical evidence of the baseline – email, PO, invoice, quotes.  Are there any one-time charges? |
| Qualifiers | Is there any certification or prequalification requirements for vendor?  Diverse companies? |
| Technical | What are the Harvard system requirements?  Are there any technical dependencies? |
| Hardware | Specifications.  Network integration.  Performance.  Compliance. |
| Software | Compatibility.  Capacity.  Security.  Customization.  Compliance.  Network integration.  Performance.  Licensing implications. |
| Services | Repair.  Service.  SLAs.  Support,  Help desk.  Lead-time.  Warranty.  Disposal.  Consumables.  Hours of support.  What happens if the service and/or product is not delivered? What is the impact to business?  Pre-launch and post-Launch |
| Training |  |
| Implementation | Pre-implementation, Implementation, Post-implementation |
| Transition |  |
| Delivery |  |
| Reporting |  |

# 

1. Pricing
   1. The following are Harvard’s minimum requirements pertaining to pricing:
      1. Harvard expects a clear, consistent pricing methodology that is sustainable throughout the life of the contract.
      2. No additional fees or costs will be deemed appropriate unless otherwise explicitly agreed.
      3. Pricing should provide a transparent model which allows Harvard to effectively manage its cost regardless of the model chosen.
      4. All prices should be in US dollars exclusive of taxes, tariffs and duties.
   2. Pricing Proposal

|  |  |  |
| --- | --- | --- |
| **Reference Number** |  | **Vendor** |
|  | Please provide a detailed spreadsheet (in an editable Microsoft Excel format) that documents your pricing alternatives. |  |
|  | You must disclose to Harvard any third party entities (e.g., business partners, other companies, consultants, subcontractors) you partnered with in response this RFP. Have you worked with any third party (yes or no)? If Yes, please explain your procedures to manage their performance. Name all subcontractors/third parties and describe their roles. |  |
|  | If you have you worked with any third party (as described above), please provide the name of the third party. |  |
|  | If you have you worked with any third party (as described above), please elaborate on the nature of what the third party has provided. Please be specific and thorough in your explanation. |  |

1. Attachments

The following documents are attached to this RFP:

* 1. [Sourcing Manager – add any relevant attachment here]
  2. [Sourcing Manager – add any relevant attachment here]

1. Authority and Signature

You acknowledge that you read, understand and agree to be bound by the terms of this RFP. You represent, warrant and covenant that your response to each section of this RFP is accurate, complete, and has been submitted by the Proposal Due Date. You understand and agree to be bound by your responses to each section of this RFP, including, but not limited to, any and all supplemental documentation and attachments. You have full power and authority to enter into an Agreement based upon the information contained in this RFP and any Proposal; and the person signing this proposal on your behalf has been properly authorized and empowered to respond to this RFP and provide the information required to respond to this RFP.

Full Legal Name of Vendor

Print Name of Person Signing the Proposal

Signature of Person Signing the Proposal

Title of Person Signing the Proposal

Date Signed