



REQUEST FOR PROPOSAL (RFP)

Title: Employee Service Recognition Awards

RFP #: **BC1-2018**

Date Issued: Tuesday, April 2, 2018

Due Date: **Thursday, April 26, 2018 at 3:00 pm**

RFP Issued By: Brian Cook, RFP Coordinator
SMU – Purchasing

1.0 GENERAL OVERVIEW

1.1 Background

As a private, tax-exempt university enriched by its United Methodist heritage and partnership with the Dallas-Fort Worth area, SMU seeks to enhance the intellectual, cultural, technological, ethical, and social development of a diverse student body. SMU offers undergraduate programs centered on the liberal arts and excellent graduate, professional, and continuing education programs. The SMU experience also includes accessible faculty in small classes and abundant opportunities for research experience, international study, leadership development, and service and internship opportunities beyond campus – all with the goal of preparing students to become contributing citizens and leaders for our state, nation and world.

SMU has approximately 11,000 students studying in seven degree-granting schools: Cox School of Business, Dedman College of Humanities and Sciences, Meadows School of the Arts, Bobby B. Lyle School of Engineering, Dedman School of Law, Annette Caldwell Simmons School of Education and Human Development, and Perkins School of Theology.

Founded in 1911 by what is now The United Methodist Church, SMU is nonsectarian in its teaching and committed to academic freedom and open inquiry. Owned by the South Central Jurisdiction of the United Methodist Church, SMU is managed by a Board of Trustees that includes civic, business, education, and religious leaders who represent various faiths and geographic areas.

1.2 Purpose

The purpose of this **Request for Proposal (RFP)** is to solicit proposals from qualified Vendors (Also referred to as Contractors or Providers within this document) that can provide high quality employee recognition service awards along with consistent delivery and outstanding customer service. **An initial one (1) year agreement will be sought with optional one (1) year extensions for up to five (5) years.**

2.0 RFP SCHEDULE INFORMATION

2.1 Schedule

Issue Request for Proposal	April 3, 2018
Last Day for Questions	April 13, 2018
Closing Date – 3 PM	April 26, 2018
Evaluation	Week of April 30, 2018
Notice of Award	Week of May 11, 2018

2.2 Questions and Inquiries

All inquiries concerning the RFP should be directed to:

Brian Cook, RFP Coordinator SMU – Purchasing

Email: brianc@smu.edu Phone: 214-768-0099

Questions should be submitted in writing via email. Written questions should be directly tied to the RFP and should be asked in consecutive order, following the organization of the RFP reference the RFP section. General questions will be shared with all those firms participating in the process. Short procedural inquiries may be accepted by telephone or email by the buyer, however, oral explanations or instructions given over the telephone shall not be binding upon the University.

2.3 Bidder Responsibility

The bidder assumes sole responsibility for the complete effort required in this RFP. No special consideration shall be given because Vendor's failure to be knowledgeable of all the requirements of this RFP. By submitting a proposal in response to this RFP, the Vendor represents that it has satisfied itself, from its own investigation, of all the requirements of this RFP.

2.4 Cost Liability

SMU assumes no responsibility and bears no liability for costs incurred by firms in the preparation and submittal of proposals in response to this RFP.

2.5 Revisions to this RFP

In the event that it becomes necessary to clarify or revise this RFP, such clarification or revision will be by an Amendment. Any RFP Amendment will be emailed to all participants. Any amendment to this RFP shall become part of this RFP.

2.6 Proposal Acceptance/Rejection

SMU reserves the right to reject any or all proposals, to accept or reject any or all the items in the proposal and to award the Preferred Agreement in whole or in part as deemed to be in the best interest of SMU. SMU reserves the right to negotiate with any vendor if such action is deemed to be in the best interest SMU.

3.0 SCOPE OF WORK

The specifications contained shall be construed as the minimum acceptable standards for an Employee Service Awards Program. Vendor is responsible for the overall approach of the Employee Service Recognition Awards Program.

Vendor will be required to work in conjunction with SMU staff throughout the project. Vendor shall meet as requested to resolve any problems that may occur.

Vendor shall be responsible for providing all necessary components, subcontract costs and any other parts required and/or necessary in order to provide a complete and operational Employee Service Recognition Awards Program for both locations (SMU main campus and SMU Taos).

Proposal must include a representative sample of a letter, online brochure, online order form, and 5 year certificate example. Proposed cost for these items should be indicated.

3.1 Award Items Overview

The selected Vendor shall provide a selection of high quality products per anniversary year. SMU desires to implement a program that allows for recognition at 3 years of service, 5 years of service, 10 years of service, 15 years of service, 20 years of service, 25 years of service, 30 years of service, 35 years of service, 40 years of service, and 45 years of service (if it is met). Costs should include award item, a personalized thank you for your service letter from the President of the University (provided by SMU), a certificate of service award, and shipping. SMU wishes to make a donation to SMU Libraries if no award is requested.

There should be a recognizable increase in the value of items as the years of service increase. Proposer will have flexibility in suggesting the items to be offered for each service category. In evaluation of these items, consideration will be given to the quality, variety, workmanship and appearance of selection of choices for each service category. Prior to final award of the contract, SMU may request to see actual samples of the items for inspection and approval. SMU's seal logo must be an option to be displayed on each service award item if requested by the recipient. Proposer must specify recommendation as to how and where SMU's seal logo should be displayed (e.g. etching, engraving, affixing emblem, etc.). Proposer must also specify how SMU's seal logo will be included and/or represented in non-traditional awards for which the logo cannot be affixed. All items must have a guarantee of at least 90 days or the manufacturers guarantee, whichever is longer. Proposed cost for each award level (3, 5, 10, 15, 20, 25, 30, 35, 40, and 45) by year needs to be provided in the Proposer proposal.

SMU reserves the right to change benefit levels. Vendor shall provide new groupings of gifts within thirty (3) days of notification of change of benefit levels.

3.2 Congratulatory Letters & Certificates

In addition to service awards, the Vendor must prepare and provide all of the following:

- Personalized congratulatory letter on SMU letterhead with scanned signature of the President of the University
- Personalized color certificate of appreciation with SMU's seal logo, employee name, years of service, and scanned signature of the President of the University

3.3 Catalog/Brochure Online Portal

The selected Vendor's Catalog/Brochure shall be available in an electronic (web-based) format with the ability for SMU employees to view and order awards via an SMU branded portal, SMU specific webpage, or other web based application. All costs associated with the creation, distribution, management, set-up, interface and delivery of all catalog/brochures shall be borne by the vendor.

3.4 Ordering & Delivery

The Vendor should provide a secure electronic data interchange (e.g. FTPS) of employee information. The vendor shall verify quarterly with SMU Human Resources, the names, service dates, and contact information of the eligible employees for the upcoming three (3) month period. Vendor shall contact eligible employees by an individual preferred method (e-mail or U.S. Mail) as indicated on the quarterly spreadsheet report within thirty (30) days in addition to sending service award notification and certificate.

SMU employees should be able to view and order awards via a secure online web portal or application.

If after three (3) attempts to contact employee to redeem their service award is unsuccessful, the employee will be notified of a default donation chosen by SMU. If an employee elects not to obtain the gift item and desires to donate to a designated charity, the Vendor shall provide that information to SMU and SMU will initiate the payment to the charity. SMU will detail to the Vendor the available charity/SMU options for donations.

3.4.1 Delivery

Delivery of gift selection shall be in the name of the employee, the department in which that employee works, and to the following SMU address:

Expressway Tower
SMU Human Resources
6116 N. Central Expressway
Dallas, TX 75206

Gifts should be individually packaged per each employee or, if grouped into a larger package, should be individually packaged and identifiable per employee within the larger package. No additional sorting or packaging should need to be done by SMU Human Resource staff.

Additionally, the selected Vendor shall provide the option for the employee to ship the gift to their home address.

All employee recognition items should be delivered within three (3) weeks of order placement.

A tracking number should be provided via email to the SMU employee and SMU Human Resources assigned contact for every award that is shipped.

3.5 Pricing & Payment

Price is to include delivery of all equipment, gift destination, to the locations listed herein. Pricing for services is to include all supervision as needed, all parts, equipment and materials, start-up fees, labor, mileage, and any other expenses needed to complete the services required. SMU will reject shipments sent C.O.D. or freight collect.

Vendor shall develop and submit a preliminary list of gifts for each of the years of service categories (3, 5, 10, 15, 20, 25, 30, 35, 40, and 45). All gifts shall be able to display legibly the SMU approved logo. Should the logo change the vendor will be expected to make necessary modifications for future award items at a reasonable rate to SMU. SMU encourages the Vendor's proposal to include a range of different priced potential award options to be included.

Vendor shall not require a minimum dollar level spend per year and shall invoice for products after delivery with net 30 payment terms. No pre-payment of any orders shall be allowed. All invoices should be delivered electronically to invoices@smu.edu. Vendor shall provide, at a minimum, an itemized invoice for each individual employee award shipment.

Vendor shall provide to SMU a quarterly cost analysis report showing the number of awards purchased in each award category, the average costs for each category and all other costs incurred.

3.6 Additional Services

In addition to the requirements outlines with the Scope of Work, SMU is interested in any additional services provided by the selected Vendor, including, but not limited to, the following:

- Provide education (e.g. webinars, on-campus workshops), resources, and information about employee recognition.
- Provide dedicated customer service representative
- Create a virtual Hall/Wall of Fame for employees who are part of 25+ Club Members
- Provide lapel pins for 25+ Club Members and annual Presidential Recognition Awards
- Program to include a platform, which has peer to peer recognition, manager to employee recognition, service award milestones, special presidential award nominations, etc.;
- Multi-media application from several devices such as: computers, iPads, smartphones, etc.;
- Acceptable integration with PeopleSoft HCM

All details of services not specifically mentioned which are regularly furnished in order to complete this type of work will be furnished at the proposed pricing and shall confirm in quality, workmanship and service level to that provided by the practice as specified in the Request for Proposals. The Proposer's proven track record and approach towards the successful implementation of these services are critical factors in the selection process.

4.0 Proposal Content Requirements

Proposals should include comprehensive responses to the following and address items as specified in the Scope of Work. Proposals are required to follow the exact order as provided in the RFP document so that all proposals can be evaluated on an equal and timely basis.

4.1 Vendor Overview

4.1.1 General Company Information

List the company name, corporate and local addresses (if different), main phone number, web address, and person authorized to commit the company to the terms specified in the proposal. Provide a brief history of the firm and number of years in business.

4.1.2 Contact Information

Provide information on the composition of the firm including those individuals assigned to work with the University. List the names, positions, responsibilities and a brief description of their experience (highlight university experience) for each of your personnel that will be assigned to SMU's account. List the address and contact information of the office that will be serving this account. List contact information for after 5:00 PM hours.

4.1.3 Services Offered

Provide a detailed description of the solution you are proposing in response to the specifications outlined and information requested within the Statement of Work. Include details on service level award variety and selection, employee communications, data transfer protocols and security, ordering processes, and any other relevant information.

4.2 Subcontractor Information (if applicable)

List the names and addresses of any subcontractors that will be utilized on this account. State what products/services they will provide. If applicable, indicate whether the listed subcontractors are certified as MBEs (Minority Business Enterprise) or WBEs (Women Business Enterprise), SDVOB (Service Disabled Veteran Business), or HUB (Historically Underutilized Business).

4.3 References

The proposal must include a minimum of three accounts that are similar in size and scope to SMU and with whom you have worked with in the past two years. The list must include each reference's name, address, contact person, length of relationship, a description of the products/services provided, and the volume of work currently doing business with each reference given.

4.4 Pricing

The proposal should include detailed pricing for the services that are described within the Statement of Work. The pricing proposal submitted in response to this RFP will become the basis for a formal contract with the selected vendor.

4.5 Additional Requirements

In addition to submitting a proposal that address the requirements outlined within the Statement of Work, SMU also requests that the Vendor submit answers in direct response to these questions:

1. Does the vendor offer a lapel pin and how does the design process for that work?
2. Provide a process map describing the process and timeline of sending an award to an SMU employee from notification that an award is due to return policy if necessary.
3. Do you have any other customers that make a charitable donation if an award is refused? If so, what does this process look like?
4. Does your electronic system have the ability to track missing packages?
5. Do you provide any standard reporting in addition to invoices?
6. Are there any company competencies or additional value added services that you are offering as part of your proposal that you think differentiates you from other potential vendors.

5.0 PROPOSAL SUBMITTAL

For consideration, vendors must submit a comprehensive response that meets the minimum requirements included in the RFP and Scope of Work.

Proposals are required to follow the exact order as provided in the RFP document so that all proposals can be evaluated on an equal and timely basis. Copies of proposals must be submitted as stated below and not to any other office or department at the University.

Each firm is required to submit one (1) electronic copy of their proposal to:

brianc@smu.edu

Each firm is required to submit five (5) hard copies of their proposal to:

ATTN: SMU Purchasing
6116 N. Central Expressway
Suite 205A
Dallas, TX 75206

Electronic proposals must be received by 3:00 p.m. CST on or before Thursday, April 26, 2018. Hard copy proposals should be postmarked on or before April 26, 2018.

Proposals, modifications or withdrawals received after the date set for receipt of proposals may not be considered. Offers submitted in response to the RFP STEP 1 shall be valid for 120 days from the closing date.

Bidders shall not contact any person within the University directly, in person, by email or by telephone, other than the assigned buyer (or other authorized person) concerning this RFP.

6.0 RFP EVALUATION COMMITTEE

Each proposal will be evaluated by the RFP Evaluation Committee comprised of SMU Human Resources and Business Finance staff. The RFP Evaluation Committee will initially review all proposals for completeness and compliance with the terms and conditions of the RFP. Proposals clearly inconsistent with the RFP requirements will be eliminated from further consideration. Proposals that pass the completeness and compliance review will be evaluated against the Basis of Selection outlined below. The RFP Evaluation Committee is the sole judge of the best offers and reserves the right to accept or reject any or all proposals. The Contractor recognizes this by submitting a proposal.

7.0 BASIS OF SELECTION

The RFP Evaluation Committee will evaluate proposals and select firms based on a best value analysis involving the following factors.

- The firm's plan to meet the requirements as outlined in the **Scope of Work**
- The firm's comprehensive responses to requirements as requested in the **Proposal Content Requirements**
- The quality of the proposal, responsiveness to requirements and adequacy of information provided.
- The firm's ability to demonstrate quality of work and superior customer service.
- The proposed pricing and overall potential cost to the University.
- Any other factors relevant to the firm's capacity and willingness to satisfy the University's needs