

**Request for Proposal  
for  
Call Center Operations**

**SPC Proposal #04-16-17**

**St. Petersburg College**

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**SPC**

**Due March 14, 2017 at 2:00 pm (EDT)**

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## ***Background***

**HISTORY:** St. Petersburg College (“SPC” or the “College”), located in Pinellas County, Florida, and established in 1927, is one of the oldest colleges in the Florida College System (“FCS”). SPC is the first college in the FCS to become a four-year college issuing baccalaureate degrees beginning in 2001. SPC is governed by a five-member Board of Trustees appointed to four-year terms by the Governor of Florida. The Board of Trustees appoints the College President who has administrative responsibilities for college operations.

**ACADEMICS:** Enrollment in 2014 - 2015 included 57,354 students, including 44,411 credit seeking and 12,943 non-credit seeking (Source: spcollege.edu). St. Petersburg College offers more than 100 academic programs, and career training to university transfer options to bachelor's degrees at ten locations throughout Pinellas County and online. Ninety-five percent of SPC’s 379 full-time faculty hold advanced degrees.

**REQUEST FOR PROPOSAL:** St. Petersburg College is soliciting proposals from companies experienced and qualified to answer incoming phone calls from students, prospective students and the general public. This includes, pre-admissions, admissions and enrollment, and financial aid related calls. It also includes calls received in our Call Center from the general public about events, hours of operation, etc. It does not include our Learning Management System or Technical Helpdesk support phone calls.

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## ***General Conditions***

**RESPONDENTS:** Respondents who wish to be considered for the services requested in this Request for Proposal (“RFP”) must follow the instructions herein and provide all of the requested information. SPC reserves the right to disqualify any Respondent whose proposal does not comply with this RFP.

**SEALED PROPOSAL:** Respondents must submit their proposal in a sealed envelope with the outside of the envelope containing (1) the Respondent’s name and address, (2) the proposal number, and (3) the date the proposal is scheduled to be opened by the College which is provided in this RFP. Envelopes not containing this information will not be opened nor considered by the College, and will be returned to the Respondent.

The following items must be contained within the sealed envelope: (1) one original proposal marked as “original” with wet-ink signatures, (2) nine copies of the original proposal, and (3) one electronic version of the original proposal stored on a flash drive or compact disc (CD).

By submitting a proposal, the Respondent acknowledges and accepts the terms and conditions provided in this this RFP.

1. **EXECUTION OF PROPOSAL:** Each proposal must be signed by an authorized representative of the Respondent’s company. The proposal must be completed in ink or typewritten. If a correction needs to be made to the proposal, the Respondent must draw a single line through the language or figure that needs to be corrected and insert the new language or figure above the stricken text. Corrections must be initialed by the person signing the proposal. It is the Respondent’s responsibility to ensure any handwritten language or figure is legible to the College. Otherwise, the College is not required to consider such language or figure.
2. **PROPOSAL PREPARATION COSTS:** Any expense involved in preparing or submitting a proposal, and any work performed in connection with the proposal, shall be borne solely by the Respondent. No payment will be made by the College for any proposal received or for any other effort required, or made by, the Respondent submitting the proposal prior to contract management.
3. **PROPOSAL SUBMISSION AND OPENING:** Proposals must be hand-delivered or mailed to St. Petersburg College, Attn: Mr. Joe Smith Director of Procurement, EpiServices, 14025 58<sup>th</sup> Street North, Rm 242, Clearwater, Florida 33760. . The College must receive the proposal no later than 2:00 p.m. Eastern Daylight Time (according to the College’s time piece) on March 14, 2017.

4. It is the Respondent's responsibility to ensure the proposal is timely submitted and received by the College. The College will not be responsible for late deliveries or delayed mail. Proposals received by the College after the deadline will be returned unopened to the Respondent without being considered by College.

**Facsimile or electronic proposals will not be accepted. Proposals must be provided in hard copy format, in a sealed and properly labeled envelope, as referenced in General Conditions.**

Once opened, proposals become the property of the College and will not be returned.

5. **SUMMARIZED SCHEDULE OF RFP EVENTS**: Below is a summarized schedule of RFP events:

<i>Time</i>	<i>Date &amp; Day</i>	<i>Description</i>
	2/1/17- Wednesday	RFP issued
	2/8/17 – Wednesday to 2/15/17 Wednesday	<p>Questions &amp; Answers:</p> <p>Respondents will have an opportunity to pose questions about this RFP and the selection process. Questions must be submitted in writing via email to SPC's Purchasing Director, Joe Smith at Smith.JoeC@spcollege.edu . The Q&amp;A period will last from 2/8/17 to 2/15/17, following which the College will create a list of questions and answers developed during the Q&amp;A period and disseminate the list to all registered and qualified companies. The list will also be posted to the College's Purchasing website.</p> <p>No questions, verbal or written, will be accepted after the Q&amp;A period ends.</p>
3:00PM	2/15/17 - Wednesday	Q&A period ends
3:00PM	2/20/17 - Monday	Q&A List posted on <a href="http://www.spcollege.edu/purchasing/">www.spcollege.edu/purchasing/</a>

2:00PM	3/14/17 - Tuesday	RFP Deadline
2:01PM	3/14/17- Tuesday	RFP Opening at St. Petersburg College – EpiServices, 14025 58th Street North, Clearwater, FL 33760 in Room 217
	3/15-3/22/17 Wednesday-Wednesday	Selection committee reviews proposals
	3/24/2017- Friday	Top 3 finalist will be notified if presentation is required.
	3/24/2017- Friday	Notice of recommended intent to award (if presentation are not required)
	3/28/2017- Tuesday	Presentations from top three finalist (if required)
	3/30/2017- Thursday	Notice of recommended intent to award (if presentations occur)

6. **REGISTRATION:** Prior to submitting a proposal, each Respondent must register with the College's Purchasing Office in order to be placed on the distribution list for addenda or official communication concerning this RFP. Please register at <http://www.spcollege.edu/purchasing>
7. **CHANGES OR MODIFICATIONS** The College reserves the right to make changes to this RFP. Changes may include but are not limited to postponing the due date of proposals or revising RFP specifications. All changes will be announced and disseminated by the College's Purchasing Department via addendum posted to the College's Purchasing

website and sent to registered Respondents via email with sufficient time for Respondents to amend their proposals following the College's change. Respondents must acknowledge receipt of all addenda by signing, dating, and returning the acknowledgment page of the addendum with the Respondent's proposal.

8. **CONFLICT OF INTEREST:** By submitting a proposal, each Respondent acknowledges and agrees to comply with Section 112.313(3), Florida Statutes, which provides:

*(3) DOING BUSINESS WITH ONE'S AGENCY.—No employee of an agency acting in his or her official capacity as a purchasing agent, or public officer acting in his or her official capacity, shall either directly or indirectly purchase, rent, or lease any realty, goods, or services for his or her own agency from any business entity of which the officer or employee or the officer's or employee's spouse or child is an officer, partner, director, or proprietor or in which such officer or employee or the officer's or employee's spouse or child, or any combination of them, has a material interest. Nor shall a public officer or employee, acting in a private capacity, rent, lease, or sell any realty, goods, or services to the officer's or employee's own agency, if he or she is a state officer or employee, or to any political subdivision or any agency thereof, if he or she is serving as an officer or employee of that political subdivision. The foregoing shall not apply to district offices maintained by legislators when such offices are located in the legislator's place of business or when such offices are on property wholly or partially owned by the legislator. This subsection shall not affect or be construed to prohibit contracts entered into prior to:*

- (a) October 1, 1975.*
- (b) Qualification for elective office.*
- (c) Appointment to public office.*
- (d) Beginning public employment.*

9. **COLLUSION/DISCLOSURE:** By submitting a proposal, each Respondent acknowledges and agrees to the following statement:

*I, (name of Respondent), certify that my proposal is made without previous understanding, agreement, or connection with any person, company or corporation making a proposal for the same work in this Request for Proposal, and that my company's proposal is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action.*

Respondent also acknowledges and agrees to the following statement:

*No member of my company's ownership, management or staff has a vested financial interest in any aspect or department of the College.*

Any respondent who cannot agree with these statements should not submit a proposal.

10. **PROPOSAL WITHDRAWAL:** Respondents may withdraw their proposals by notifying the College in writing any time before the proposal opening. Upon receiving a Respondent's timely notification of withdrawal, the College will return the unopened proposal to an authorized representative of the Respondent's company, who will be required to disclose his or her identity via company business card and driver's license. The authorized representative will be required to sign for receipt of the proposal.

Any proposal submitted to the College constitutes an irrevocable offer by the Respondent to provide the College with the services requested in this RFP and any response thereto, for a period of 120 days from receipt of the proposal.

11. **SUBCONTRACTING:** The name and company of any subcontractor contemplated for use must be included as part of Respondent's proposal.
12. **ACCURACY OF PROPOSAL INFORMATION:** Respondents must ensure the accuracy of their proposal information. The College reserves the right to disqualify any proposal that includes inaccurate, misleading, exaggerated, or incorrect information.
13. **FUTURE ADVERTISING:** In submitting a proposal, a Respondent agrees not to use the results of the College's selection process in any future commercial advertisements without obtaining the college's prior written content
14. **PUBLIC ENTITY CRIMES:** By submitting a proposal, a Respondent and their company acknowledges and agrees to comply with the Public Entity Crimes Statement referenced below:

*A person or affiliate who has been placed on the convicted Respondent list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded work or perform work as a contractor, supplier, sub-Respondent or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Florida Statutes, Chapter 287 for Category Two for a period of thirty-six (36) months from the date of being placed on the Convicted Respondent list.*

15. **PUBLIC RECORDS:** Any material submitted in response to this RFP is subject to disclosure under Florida's Public Records law, Chapter 119, Florida Statutes.
16. **RESERVATION OF RIGHTS:** In addition to all other rights of the College under Florida law or the Board of Trustees Rules and College Procedures, the College specifically reserves the following:
- a) The College reserves the right to rank companies pursuant to the relative Florida

Statutes and the Florida Administrative Code and to negotiate with the highest-ranking company.

- b) The College reserves the right to reject this RFP.
  - c) The College reserves the right to reject any and all proposals submitted in response to this RFP.
  - d) The College reserves the right to remedy or waive technical or immaterial errors in this RFP or the submitted proposals.
  - e) The College reserves the right to request any necessary clarifications or statement data without changing the terms of any proposal.
17. **DISPUTES & PROTESTS**: Any actual or prospective Respondent who is allegedly aggrieved in connection with the issuance of this RFP or pending award of contract, may protest to St. Petersburg College, Attn: **Mr. Joe Smith Director of Procurement**, P.O. Box 13489, St. Petersburg, Florida 33733. The protest must be filed in accordance with Chapter 120, Florida Statutes. Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.
18. **IDENTICAL OR TIE BIDS**: In the event two or more Respondents receive the exact same score from the evaluation team, the following criteria, in order of importance, shall be used to break the tie: (1) Drug Free Work Place Certification, (2) Florida Respondents, or (3) whether Bidder's place of business is within Pinellas County.
19. **EQUAL OPPORTUNITY**: All work on this project will be carried out in compliance with the College's commitment to the concept of equal opportunity; that is, there will be no discrimination on the basis of race, color, religion, sex, age, national origin, marital status, ethnicity, sexual orientation, gender identity, genetic information or against any qualified person with a disability. Recognizing that sexual harassment constitutes discrimination on the basis of sex, neither the College nor the Respondent shall not tolerate such conduct.
20. **INDEMNIFICATION**: To the fullest extent permitted by law, the Respondent shall indemnify, hold harmless and defend the College, its Trustees, officers, agents, servants, and employees, or any of them, from and against all claims, damages, losses, and expenses including, but not limited to, attorneys' fees and other legal costs including but not limited to costs for paralegal, investigative, and legal support services, and the actual costs incurred for expert witness testimony, arising out of or resulting from the performance of services required under the contract resulting from this RFP, provided that same is caused by the negligence, recklessness, or intentional wrongful conduct of the Respondent or other person or company utilized by the Respondent in the performance

of the work. Nothing herein shall be deemed to affect the rights, privileges, and immunities of the College as set forth in Section 768.28, Florida Statutes.

21. **LEGAL REQUIREMENTS:** Applicable provisions of all federal, state, local laws and ordinances, College rules and procedures shall govern development, submittal and evaluation of all proposals received in response to this RFP and shall govern any and all claims and disputes which may arise between Respondent and the College by and through each entity's officers, employees and authorized representatives, or any other person, natural or otherwise; and a lack of knowledge by the Respondent shall not constitute a valid defense against the legal effect thereof.
22. **CONTRACT TYPE:** The College anticipates entering into a deliverable based reimbursement contract with the successful Respondent. Deliverables will be aligned with the outcome measures referenced in this RFP. The College anticipates **a contract term of two years (beginning with the last of the two parties to sign) with the option to renew for two additional one-year terms upon written consent of the College and the selected Respondent.** The laws of Florida shall govern any contract entered into by the College and selected Respondent.
23. **PROPOSAL SPECIFICATIONS:** The Proposal Specifications requested under this RFP follow these General Conditions. To the extent there is a conflict between the General Conditions and the Proposal Specifications, the Proposal Specifications will govern and control.

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## ***Proposal Specifications***

1. **PROJECT OVERVIEW**: The goal of this project is to find the best vendor that specializes in handling large volume of calls in a higher education environment, uses state of the art technology, and is experienced with general advising, registration and financial aid.
2. **REQUIREMENTS AND PREFERENCES**: Please respond to each of the questions/requirements below (both those labeled as required and preferred) Additional information may be provided as attachments. Each response must be labeled with the corresponding question/requirement number. The maximum page limit for responses not including required addenda, is 45 pages.

Question/ Requirement  #	Question/Requirement	Required or Preferred
	<b>General, Experience, Qualifications, and Training</b>	
1)	Describe your form of business (i.e., individual, sole proprietor, corporation, non-profit, partnership, LLC) and provide a brief descriptive statement indicating your credentials to deliver the services sought under this RFP including how long your business has been performing the services required.	Required
2)	Provide an organizational structure with number of employees, a summary of client base, and location of offices. Include any current or future plans for Off-Shoring call center support. (Priority may be given to US based call centers)	Required
3)	Provide a narrative description of the proposed project team and its organizational structure including qualifications of team leads.	Required
4)	Provide State or Community College customer references, including phone number and email addresses, for similar sized clients with similar scope of work. Please include how many years the school has been with your inbound phone support services. Provide customer references, including phone number and email.	Required

5)	Expected hours of operation (EST):  8:30 a.m. to 7:00 p.m. M – R 8:30 a.m. to 2:00 p.m. F Can your company accommodate those hours?	Required
6)	Describe your company’s ability to scale services in the event we anticipate a larger than normal number of calls (e.g. weather emergency notification, due date reminders to 30,000 students, anticipated peak registration, etc.)	Required
7)	What is your estimated turnover rate in employees per year? Are your employees seasonal? If yes, please describe the % of your staff that remain yearly vs. those who are seasonal. What % of your seasonal employees are new hires and is the training process different for a returning vs. new employee?	Required
8)	Does your company support SMS text messaging, e-mail and online chat? Describe which ones if any are supported.	Required
9)	Include Implementation plan including key milestones and timeline. How long does it typically take to “go-live” with a client of similar size and scope?	Required
10)	Ability to escalate student to Level 2 Support at our institution when necessary (ticketing system). Describe this process. Can you walk us through some examples of types of calls escalated today?	Required
11)	Provide a narrative that illustrates your company’s understanding of the RFP requirements and how your company will complete the scope of services and accomplish the required objectives.	Required
12)	Provide a description of your company’s experience with PeopleSoft Student Information System.	Required
13)	Provide a description of your company’s experience with Interactive Voice Response (IVR) and to set up emergency messaging.	Required
14)	Does your company have an understanding of the Family Education Rights and Privacy Act (FERPA)?	Required
15)	What questions are typically asked of callers to verify that the caller is indeed the student?	Required
16)	Call Center agents must have the ability to communicate the value proposition of St. Petersburg College over other higher education institutions to prospective students. Including but not limited to; lower cost, quality and personalized instruction with a focus on learning, a broad spectrum of Workforce ready Associate in Science and Career Certificate programs designed to get students into high-wage jobs quickly, convenient locations, both online and in-person instruction, and world class student support system designed to help students be successful.	Required

17)	Call Center agents must possess an understanding of our academic admissions and program requirements, admission knowledge to include Associate of Arts (AA), Associate of Science (AS), and upper division programs and ongoing updates, and familiar with selling non-credit programs.	Required
18)	Describe your typical training plan including length of time to meet with College staff to learn our business processes, frequency of training personnel assigned to our account and ability to receive new trainings on-demand.  <i><b>Note: We typically do not make changes in the middle of a term and generally implement major changes prior to the start of a term. We have 3 terms per year.</b></i>	Required
19)	Describe the anticipated number of site visits for both your company and the college.	Required
	<b>Ability to support detailed Financial Aid calls (e.g. Master Promissory Notes (MPN), loans, status support, verification, Satisfactory Academic Progress (SAP), etc.)</b>	
20)	Able to assist students on how to apply for financial aid and access general account information.	Required
21)	Ability to verify FAFSA status, identify discrepancies and verify checklist items.	Required
22)	Review Verification (e.g. identify if student selected, verify status, explain needed corrections from comments, understand workflow queue, etc.).	Required
23)	Knowledge of Loans (e.g. verify eligibility, educate students on how to accept/decline/reduce, entrance counseling, exit counseling, MPN, Disbursement, and Refund process).	Required
24)	Understand Satisfactory Academic Progress (SAP) with ability to explain and verify.	Required
25)	Ability to verify criteria for due date extension.	Required
26)	Review financial aid holds and explain processes (e.g. Business office-receivable hold, Return to Title IV, etc.).	Required
27)	Ability to understand and explain payment options including SPC's Payment Plan.	Required
	<b>Admissions, Registration and Advising</b>	
28)	Provide a description of your company's experience with Enrollment Services, specifically, Admissions, Registration and Advising.	Required
29)	Ability to walk a student through our admission steps and explain outstanding items within a student's to-do-list.	Required

30)	Ability to communicate SPC's Business processes related to admissions, academic advising, and registration including key dates and policies.	Required
31)	Understand pre-requisite and co-requisite requirements in order to assist a student with registration.	Required
32)	Firm understanding of our student portal and able to assist students with navigation of portal.	Required
33)	Able to explain the general requirements for eligibility for in-state tuition (Florida residency for tuition purposes) and walk a student through our Residency website.	Required
34)	The ability to explain residency checklist items to students.	Required
35)	Ability to use the systems we provide access to (e.g. PeopleSoft, Who's Next, OneNote, Salesforce etc.).	Preferred
36)	Assist Transient students (e.g. Explaining payment options, process needed to register, specific contacts, etc.).	Required
	<b>Key Performance Indicators</b>	
37)	Benchmarking - Describe your company's answered call and abandoned call rates for your larger clients.	Required
38)	Describe how an abandoned call is defined (after a period of waiting how long)?	Required
39)	Benchmarking - Describe your company's response rate (how long a caller waits on average, before the call is answered)?	Required
40)	Benchmarking - What is your first contact resolution rate? What percentage of calls is your company able to answer without escalating back to St. Petersburg College? What is your escalation rate for clients similar in size?	Required
41)	Quality Assurance - Describe your QA plans including frequency of call center employee meetings with supervisor and whether or not calls are recorded for process improvement. If calls are recorded, may they be retrieved in the event the College wants to review it with a student? If SPC wanted to retrieve a call, could we retrieve it on our own. If yes, how long is the call retained?	Required
42)	Quality Assurance - Explain how you evaluate performance and that objectives have been met for online chat support, e-mail support, SMS, and chat support (if applicable), and phone support. Please walk us through how employees are coached after an error is reported.	Required

43)	Reporting - Describe in detail the types of reports and the frequency in which the College will receive metrics on call volume, types of calls, response rates, caller wait-time, escalations, invalid escalations, etc. does this also include a student survey obtained after the call? If yes, would SPC be able to customize the questions asked to our students?	Required
44)	Reporting - Describe the medium in which reports will be made available to the college. Describe how your organization integrates and provides data, escalates calls to schools of similar size.	Required
45)	Reporting - Can your company create custom reports for the College if needed?	Required
46)	What are your standard Service Level Agreements?	Required
47)	Describe plans for service outages and redundancy.)	Required
48)	Do you have any bilingual agents that would be assigned to our account?	Required
	<b>Call Volume Estimates and Pricing Information</b>	
49)	The vendor can expect to receive approximately 125,000 phone calls annually. The college is seeking a vendor who can handle a high volume that ramps up and down.	
50)	Describe your company's pricing model, i.e., cost per call, cost per minute, etc. While SPC has a particular interest in exploring the price per call model, please present all detailed pricing options your company supports. If pricing is per minute, please describe how this is calculated (ex: the minutes start at the time the customer initiations the call, includes hold time, and notes after the call). If pricing is per call, please describe if callers who listen to an IVR, calls abandoned, and same day repeat callers would be considered a call.	Required
51)	What is your price based on the estimated volume of inbound calls described above.	Required

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### ***Evaluation Process***

- A. The Call Center Operations Evaluation Committee (“Evaluation Committee”) may consist of College employees as well as non-employees who have background and experience in online student services. It is anticipated the Evaluation Committee will consist of nine (9) members.
- B. The Evaluation Committee will review all proposals received and accepted, and evaluate each proposal based on the evaluation criteria provided below. The Evaluation Committee will select three (3) companies deemed to be the most highly qualified to perform the required services unless less than three proposals are received, in which case the Evaluation Committee will rank order as many companies as applied. The Evaluation committee may require the three (3) finalist to present their qualifications if deemed necessary. If a finalist is located out of state, permission may be given for the company to present their qualification by video conference. The College will then begin negotiating with the highest ranking company.
- C. Should the College be unable to negotiate a satisfactory contract with the company deemed to be the most highly qualified, at a price the College determines to be fair, competitive and reasonable negotiations with that company will be formally terminated, and the College will undertake negotiations with the second most highly qualified company. Failing accord with the second company, the College will undertake negotiations with the third most highly qualified company. Should the College be unable to negotiate a satisfactory contract with any of the selected companies, additional companies will be selected in accordance with law. The College reserves the right to determine not to proceed with the project.
- D. Once negotiations are complete, the selected company and the College will execute a contract for the required work.

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## ***Evaluation Scoring***

The evaluation criteria below correspond with the criteria provided in the Proposal Specifications above. Allotted points will be based on how well a Respondent addresses the criteria in the Proposal Specifications.

General, Experience, Qualifications, Training and Call Center location	20 Points
Ability to support detailed Financial Aid calls (e.g. Master Promissory notes, loans, status support, Verification, Satisfactory Academic Progress (SAP), etc.)	15 Points
Admissions, Registration and Advising.	15 Points
Key Performance Indicators	20 Points
Proposed cost to perform our requirements	30 Points
<b>Total Points:</b>	<b>100 Points</b>

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## ***Attachments:***

### ***1. Respondent Registration Form***

Anyone interested in doing business with St. Petersburg College is required to complete the Respondent Registration Form. The completed form does not guarantee an opportunity to submit a proposal, but does help the College in evaluating your business for future opportunities.

Business Name:	
Mailing Address (Street/P.O. box):	
City: _____	State: _____ County: _____
	Zip Code: _____
Contact Person:	Title:
Telephone #:	Fax #:
Email Address: <input type="checkbox"/> _____ <input type="checkbox"/> _____	
Is your company certified by the State of Florida's Office of Supplier Diversity as a Minority/Woman owned business?      Yes      No	
If Yes, identify certification:	
Please forward a current catalog or provide a website address if catalog is available online.	
Website Address:	
Type of business/service offered:	
<p>Please return the completed Respondent Registration Form to:</p> <p>St. Petersburg College  Attn: Mr. Joe Smith  Director of Procurement  P.O. Box 13489  St. Petersburg, FL 33733-3489</p> <p>OR -</p> <p><u>Fax to:</u> (727) 444-6653</p>	

## 2. Statement of No Proposal

If your company does not intend to respond to this RFP, please complete and return this form prior to the date shown for receipt of Proposals to: St. Petersburg College, Attn: Mr. Joe Smith, Director of Procurement, P. O. Box 13489, St. Petersburg, Florida 33733-3489. Fax # 727-444-6653

The undersigned declines to submit a proposal on the above referenced Invitation to Proposal for the following reason(s):

- ☐ Specifications are too "restrictive." (Please explain below)
- ☐ Unable to meet specifications
- ☐ Specifications were unclear. (Please explain below)
- ☐ Insufficient time to respond
- ☐ We do not offer this type of product or equivalent
- ☐ Our production schedule would not permit us to perform
- ☐ Other (please explain below)

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Company Name	Title		
<hr/>	<hr/>		
Signature	Telephone		
<hr/>	<hr/>		
Printed Name	Fax		
<hr/>	<hr/>	<hr/>	<hr/>
Address	City	State	Zip

### ***3. Proposal Certification***

I certify that this proposal is made without prior understanding, agreement or connection with any corporation, company or person submitting a proposal for the same services, materials, supplies or equipment, and is, in all respects, fair and without collusion or fraud. I agree to abide by all conditions of this proposal; I certify that I am authorized to sign this proposal.

I hereby agree to furnish the items and/or services at the prices and terms stated in my proposal. I have read and understand the terms and conditions of the Request for Proposal.

This company is in compliance with the non-discrimination clause contained in Section 202, Executive Order 11246, as amended by Executive Order 11375, relative to Equal Employment Opportunity for all people without regard to race, color, religion, sex or national origin and the implementing rules and regulations prescribed by the Secretary of Labor.

I certify that I have received the following addenda (if any):

Addendum \_\_\_\_\_ Dated \_\_\_\_\_

Addendum \_\_\_\_\_ Dated \_\_\_\_\_

Addendum \_\_\_\_\_ Dated \_\_\_\_\_

Addendum \_\_\_\_\_ Dated \_\_\_\_\_

Signature \_\_\_\_\_

Name(s) and Title(s) \_\_\_\_\_

Legal Name of Respondent \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

Date \_\_\_\_\_

#### ***4. Respondent's Qualification Statement***

The undersigned certifies under oath the truth and correctness of all statements and all answers to questions and information provided hereinafter.

Submitted to: St. Petersburg College  
Director of Procurement

Submitted by: Name: \_\_\_\_\_ ( ) Corporation

Address: \_\_\_\_\_ ( ) Partnership

Principal Office: \_\_\_\_\_ ( ) Individual

(Note: Attach separate sheets as required.) ( ) Joint Venture

( ) Other

1. How many years has your organization provided the requested services? \_\_\_\_\_

2. How many years under the present business name? \_\_\_\_\_

If applicable:

Former business name: \_\_\_\_\_ # Years: \_\_\_\_\_

3. Corporations, answer the following:

Date of incorporation: \_\_\_\_\_

State of incorporation: \_\_\_\_\_

President: \_\_\_\_\_

Regional Manager: \_\_\_\_\_

District Manager: \_\_\_\_\_

4. Partnerships, answer the following:

Date of organization: \_\_\_\_\_

Type of partnership: \_\_\_\_\_

Names and addresses of partners (if applicable):

1). \_\_\_\_\_

2). \_\_\_\_\_

3). \_\_\_\_\_

5. If other than a corporation or partnership, describe organization and name principals: \_\_\_\_\_

1). \_\_\_\_\_

2). \_\_\_\_\_

3). \_\_\_\_\_

6. Have you ever failed to complete any contract awarded to you? If so, indicate when, where, why, and name/telephone number of persons we may talk to about this: \_\_\_\_\_

1). \_\_\_\_\_

2). \_\_\_\_\_

3). \_\_\_\_\_

7. Has any officer or partner of your organization ever been an officer or partner of another organization that failed to complete a contract? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, state circumstances: \_\_\_\_\_

9. Worker's Compensation insurance policy number: \_\_\_\_\_

Name of company: \_\_\_\_\_ Policy amount: \_\_\_\_\_

10. Comprehensive General Liability policy number: \_\_\_\_\_

Name of company: \_\_\_\_\_ Policy amount \_\_\_\_\_  
(\$500,000 combined single limit minimum)

The Board of Trustees, St. Petersburg College, will be named additional insured for General Liability coverage if our company is awarded the bid? Yes \_\_\_\_\_ No \_\_\_\_\_  
(A "No" answer will disqualify your bid.)

11. Name(s) and telephone number(s) of person(s) designated as liaison with the College in administering the contract in the event of bid award (attach sheet if necessary):

\_\_\_\_\_  
Date: \_\_\_\_\_ Name of Company: \_\_\_\_\_

By: \_\_\_\_\_  
(Authorized Signature)

Title: \_\_\_\_\_

NOTARIZATION

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 2015

Personally known \_\_\_\_\_  
Notary Signature

Produced Identification: \_\_\_\_\_

Type of Identification: \_\_\_\_\_

Notary Public State of: \_\_\_\_\_

My Commission expires: \_\_\_\_\_

\_\_\_\_\_  
(Printed, typed or stamped Commissioned  
name of Notary Public)

## ***5. Drug Free Workplace***

The undersigned Respondent in accordance with Florida Statute 287.087 hereby certifies that does:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are proposed a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement, and will notify the employer of any conviction of, or plea of guilty or nolo contendere, to any violation of Chapter 893, or any controlled substance law of the United States or any state violation occurring in the workplace, no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by an employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug free workplace through implementation of this section

As the person authorized to sign the statement, I certify that this company complies fully with the above requirements.

---

Respondent's Signature

---

Date

# Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	<input type="checkbox"/> Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) _____ <input type="checkbox"/> Other (see instructions)	<input type="checkbox"/> Exempt payee
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	
	List account number(s) here (optional)	

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number								
			-			-		

Employer identification number								
			-					

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

<b>Sign Here</b>	Signature of U.S. person *	Date ▶

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

### Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.