1. General information

1.1 **Background:**

UW-Stout Polytechnic is the State of Wisconsin's comprehensive, career-focused polytechnic university. Our students, faculty and staff use applied learning, scientific theory, and research to solve real-world problems, grow the state's economy, and serve a global society.

Located in scenic Menomonie, Wisconsin, approximately one hour from the Twin Cities of St. Paul & Minneapolis, Minnesota, our campus has a long and rich history of providing a distinct array of programs in the area of art, design, and graphics, business and management, education, huma and social sciences, information technologies and communication, science, engineering, and mathematics. UW-Stout Polytechnic offers 45 undergraduate and 20 graduate degrees, including one terminal degree, with enrollment of approximately 7,600 students, including approximately 200 international students from more than 40 countries.

At UW-Stout Polytechnic, we foster a culture where students gain invaluable skills and knowledge. With 3 times as many labs as lecture halls and required experiential learning through co-operative education (internships), our students are immersed in industry-related, hands-on learning. This is partially due to our tremendous industry partnerships with internationally recognized companies.

UW-Stout Polytechnic has capacity to identify populations of students that have an established relationship with the university, either through previous application information, enrollment status in previous semesters, financial aid application information, or other means. The university needs support in high-touch, personalized, behavior-based, targeted marketing outreach to address specific students, deliver relevant messages, re-develop a relationship with individual students, and drive their behavior in the direction of re-enrolling or taking other action with the university.

1.2 **Scope:**

The university is seeking to expand the use of a tool that currently conducts social media outreach to previously admitted and stopped out students using a behavioral science approach that delivers intentional content based on prior engagement behavior. The contracted partner will leverage technology and data mining to create actionable outreach designed to drive re-engagement among a pre-determined population of students who need to take specific actions. Services provided by the contracted partner will include, but are not limited to:

1. Receiving information about students identified by UW-Stout Polytechnic.
2. Identifying social media profile information for those students.
3. Developing action-oriented, relevant messaging for a variety of student populations (i.e., Stop Outs, Admitted Not Registered, Continuing Students, Perspective Students, Alumni, etc.).
4. Developing and executing individualized outreach strategies designed to achieve specific engagement and enrollment objectives.
5. Monitoring each individual student's progression toward identified goals and adapting outreach strategies based on engagement and response behaviors.
6. Providing campaign oversight, performance evaluation and reporting to UW-Stout Polytechnic project managers.

UW-Stout Polytechnic will identify the student populations to be targeted and will provide strategic direction for the campaign. The university will retain final approval authority over all messaging and outreach methods. The

contracted partner will be responsible for developing, implementing, monitoring, and optimizing campaign activities in accordance with the university-approved strategies and objectives.
The campaign's goals are:

- Engage a list of students and drive enrollment, increased participation in Financial Aid, other college support services, or other goals agreed upon by the college and the incumbent firm.
- Adhere to UW-Stout Polytechnic's brand standards and advance brand equity for the university.
- Increase brand awareness for UW-Stout Polytechnic in accordance with the unique educational nature of the university.

See Requirements and Specifications (Section 3) for the minimum acceptable specifications for items/services desired. The University does not guarantee to purchase any specific quantity or dollar amount. Any contract resulting from this RFP must not be construed as mandatory upon any University campus, State agency or municipality. The University reserves the right to issue separate RFP's when deemed in the best interest of the University.

Proposed prices and terms shall be firm for 180 days from the date of the proposal opening.

All University of Wisconsin-SYSTEM campuses must be eligible to purchase from this contract.

1.3 Definitions:

The following definitions are used throughout this document:

- **Buyer** means the UW purchasing agent responsible for this Request for Proposal.
- **Contractor** means successful proposer awarded a contract.
- **CT** means Central Time.
- **DVB** means Disabled Veteran-Owned Business.
- **Full-Time** means 12 credits or more per semester for undergraduate students; 9 credits per semester for graduate students
- **HECVAT** mean Higher Education Community Vender Assessment Toolkit
- **MBE** means Minority Business Enterprise.
- **Part-Time** means less than 12 credits per semester for undergraduate students; less than 9 credits per semester for graduate students
- **Proposer** means a firm submitting a Proposal in response to this Request for Proposal.
- **Purchasing card** means State credit card.
- **Purchasing** means the UW Purchasing department responsible for the procurement of goods and services.
- **RFP** means Request for Proposal.
- **SLA** mean Service Level Agreement
- **Sourcing Module** means the ShopUW+ Sourcing Event Module.
- **State** means State of Wisconsin.
- **University** and **UW** both mean University of Wisconsin-STOUT POLYTECHNIC.
- **WBE** means Woman-Owned Business Enterprise.

1.4 eSupplier/VendorNet Registration:

Registration on the State of Wisconsin's eSupplier Portal (eSupplier.wi.gov) is available free of charge to all businesses and organizations that want to sell to the state. Refer to Bidder Response: Registration and Sign-in Process for further instructions. Registration allows a vendor to:

- Register for a bidders list for commodities/services that the vendor wants to sell to the state.
- Receive an automatic e-mail notification each time a state agency, including the University of Wisconsin System campuses, posts a Request for Bid (RFB) or a Request for Proposal (RFP) with an estimated value over $50,000 in their designated commodity/service area(s).
- Receive an e-mail notification of addendums/amendments relative to the RFB or RFP.

Only vendors registered, with a valid e-mail address, at the time the RFB or RFP is posted will receive e-mail notifications of addendums/amendments. Vendors who obtain the RFB or RFP from a third party; through the public notice website; or other means assume responsibility for checking for updates to the RFB or RFP.

NOTE: Registration with eSupplier/VendorNet does not register the bidder with the ShopUW+ Sourcing Event Module.

1.5 Submittal Instructions

The University is accepting electronic responses via the Sourcing Module. Required materials must be received by the due date and time listed. Proposals cannot be submitted once the event has closed in ShopUW+. **Bidders should allow ample time to enter their response in the ShopUW+ Sourcing Event Module.**

IMPORTANT

To respond to this event. Bidders must have an online profile within ShopUW+ Sourcing Event in the JAGGAER Supplier Portal. If you or your organization does not have an established profile with JAGGAER, register using this link: Supplier Login or Join JAGGAER Supplier Network (sciquest.com)

1.6 Calendar of Events

Listed below are important dates and times by which actions related to this Request for Bid shall be completed. In the event that the Procuring Agency finds it necessary to change any of these dates and times (except estimated dates and times), it will do so by posting an amendment to this RFP on Wisconsin eSupplier Portal.

Date	Event
June 29, 2026	Date of Issue of the RFP
July 16, 2026	Date Questions Due
August 6, 2026	Proposals Due
October 1, 2026	Anticipated Award Date

1.7 Parking:

University parking is very limited. Each Contractor and/or Contractor employee(s) shall make their own arrangements for parking through the University's transportation or the ordering department's business office. No additional Contractor costs will be allowed for parking fees or violations. Unauthorized vehicles parking in University lots or loading docks without permits will be ticketed and/or towed.

1.8 Reasonable Accommodations:

The University will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request.

1.9 Incurring Costs:

The State of Wisconsin is not liable for any cost incurred by proposers in replying to this RFP.

1.10 Oral Presentations, Product Demonstrations and Proposer Location Site Visits (Pre-Award):

The University at its sole discretion, may require oral presentations, product demonstrations and/or proposer location site visits to validate information submitted with the proposals. Failure of a proposer to conduct a presentation on the date scheduled or allow an on-site/proposer site visit may result in rejection of the proposal. These events cannot be used as an opportunity to alter proposals submitted.

1.11 Multiple Proposals:

Proposers who wish to submit more than one proposal may do so, provided that each proposal stands alone and independently complies with the instructions, conditions and specifications of the request. If multiple responses are submitted, the University reserves the right to select the most advantageous proposal to the University. **NOTE:** You must submit two proposals if you are wishing to bid both methods of pricing.

1.12 Appeals Process:

Any protest of the University's solicitation or intent to award must be based on an alleged violation of the Wisconsin State Statute or a provision of a Wisconsin Administrative Code. No later than *five business days* after the date of solicitation or the notice of intent to award is issued by the University, written notice of intent to protest must be received by:

The Office of the Procurement Director of the University of Wisconsin System
The University of Wisconsin-SYSTEM
780 REGENT STREET - MADISON, WI 53715

With a copy to:

Director of Purchasing Services
University of Wisconsin- SHARED SERVICES
UW-SHARED SERVICES SERVICE OPERATIONS - 660 WEST WASHINGTON AVENUE - SUITE 201 - MADISON, WI 53703

The complete protest must be received by both parties listed above no later than *ten business days* after the date of solicitation or the intent to award is issued. The protest must be in writing. Protesters must make their protests as specific as possible and must specifically identify the Wisconsin State Statute and/or State of Wisconsin Administrative Code provision(s) allegedly violated. The decision of the University regarding the protest may be appealed to the Secretary of the Department of Administration within five working days after denial by the University, with a copy of such appeal filed with the University.

1.13 Supplier Diversity Preferences

State of Wisconsin agencies may make awards to certified Minority Business Enterprise (MBE), or Disabled Veteran-Owned Business (DVB) firms submitting the lowest qualified proposal when that qualified proposal is not more than 5% higher than the apparent low proposal or the proposal is no more than 5% lower than the apparent high point score. Authority for this program is found in ss. 16.75(3m)(b)2,3, 16.75(3m)(c)(4) and 560.0335(1)(b)(3), 15.107(2), 16.75(4), 16.75(5) and 560.036(2), Wisconsin Statutes.

2. Terms and Conditions of Contract

2.1 Entire Contract:

A contract will be awarded based on the criteria established in this Request for Proposal, including attachments and any amendments issued. The RFP, the proposal response, and written communications incorporated into the contract constitute the entire contract between the parties. The hierarchy of documents in descending order for resolution is as follows:

- Resulting Contract
- Original Request for Proposal including amendments/attachments
- Proposer response to RFP
- Official Purchase Order (when applicable)

Submitting a standard Proposer contract or term and condition as a complete substitute or alternative for the language in this solicitation will not be accepted and may result in rejection of the proposal. The University reserves the right to negotiate contractual terms and conditions or reject the Proposer's response and proceed to the next qualified proposer.

Deviations and exceptions from original text, terms, conditions, or specifications shall be described fully and attached to the proposal response as an attachment. Each deviation and exception must be identified by the section/paragraph to which it applies. In the absence of such statement, the proposal shall be accepted as in strict compliance with all terms, conditions, and specifications and the proposer shall be held liable.

Any other terms and conditions provided by the Contractor for future transactions against this contract, including but not limited to click through agreements accepted by the Customer; shrink wrapped agreements; or terms submitted with quotations, order acknowledgements, or invoices; will be considered null and void and will not be enforceable by the Contractor unless agreed to in a written amendment signed by the University Purchasing Office. Any exceptions to this RFP should be submitted with your response and alternative language proposed.

2.2 Term of Contract:

It is the intent of the University to start the resulting Contract upon successful negotiations. The contract shall be effective on the contract execution date and shall run for ONE (1) year from that date.

This contract will be automatically renewed for FOUR (4) additional one-year terms, unless Purchasing is notified, in writing, by the Contractor; or notifies the Contractor, in writing, 60 calendar days prior to expiration of the initial and/or succeeding Contract term(s).

2.3 Contract Termination:

- The University may terminate the Contract at any time, without cause, by providing 30 days written notice to the Contractor. If the Contract is so terminated, the University is liable only for payments for products provided or services performed, to the extent that any actual direct costs have been incurred by the Contractor pursuant to fulfilling the contract. The University will be obligated to pay such expenses up to the date of the termination.
- Shall either party fail to perform under the terms of this Contract; the aggrieved party may notify the other party in writing of such failure and demand that the same be remedied within 5 calendar days. Should the defaulting party fail to remedy the same within said period, the other party shall then have the right to terminate this Contract immediately. Performance failure can be defined as, but not limited to, failure to provide any of the Terms, Conditions or Specifications.

- If at any time the Contractor performance threatens the health and/or safety of the University, its staff, students or others who may be on campus, the University has the right to cancel and terminate the Contract without notice.
- Failure to maintain the required Certificates of Insurance, Permits and Licenses may be cause for Contract termination. If the Contractor fails to maintain and keep in force the insurance as provided in Standard Terms and Conditions, Section 23.0, the University has the right to cancel and terminate the Contract without notice.
- If at any time a petition in bankruptcy shall be filed against the Contractor and such petition is not dismissed within 90 calendar days, or if a receiver or trustee of Contractor's property is appointed and such appointment is not vacated within 90 calendar days, the University has the right, in addition to any other rights of whatsoever nature that it may have at law or in equity, to terminate this contract by giving 10 calendar days' notice in writing of such termination.
- All notices of performance failure must be submitted in writing to the Purchasing Office-UW-SHARED SERVICES SERVICE OPERATIONS - 660 WEST WASHINGTON AVENUE SUITE 201 - MADISON, WI 53703. Purchasing shall be final authority for all performance failure determinations not resolved through the ordering department.

2.4 Orders:

Under this contract, Specific order(s), Standing order(s), or Purchasing Card orders may be issued to the Contractor(s).

- Specific order(s): issued as one-time orders
- Standing order(s): issued for a specified period of time to allow departmental personnel to issue releases against the Standing order(s) as needed.
- Purchasing Card order(s): issued as one-time order(s).

2.5 Firm Prices:

- Prices must remain firm for the initial contract term. Prices established may be lowered due to general market conditions or negotiations between the Contractor and the University.
- Contractor should promptly notify Purchasing of new or discontinued items.
- The University reserves the right to negotiate with any contracted supplier(s) to establish additional discounts and/or lower prices for products determined to meet the requirements of a University-led initiative to set product standards. Contracted supplier(s) may be asked to provide new, lower prices for these standard products and configurations for a limited, fixed term, to fall within the term of the contract resulting from this Request for Proposal.
- Price increase requests proposed after the initial Contract term, along with an updated Price List, must be received by Purchasing in writing 120 calendar days prior to the beginning of the next contract term for acceptance or rejection. Proposed price increases are limited to fully documented cost increases submitted with the request. If Purchasing deems cost increases are not acceptable, it reserves the right to rebid the contract in whole or part or to negotiate price increase requests with the Contractor. An acceptance of the price list change will be in the form of an amendment to the contract or letter to the Contractor.
- Price increases must be labeled with the contract number and should be submitted in the same format as the original pricing request. Any price increase requested that is not submitted in the proper format may be rejected.

2.6 Payment Terms:

Payment will be made NET 30 DAYS following receipt of properly submitted invoice and verification of services, not to be earlier than the census date of the term, usually ten days after the start of each term.

2.7 Invoicing Requirements:

- Invoices for Purchase Orders:

  Contractor must agree that all invoices and purchasing card charges shall reflect the prices and discounts established for the items on this contract for all orders placed even though the contract number and/or correct prices may not be referenced on each order.

  The University must meet a statutory mandate to pay or reject invoices within 30 days of receipt by University Accounts Payable. Before payment is made, it also must verify that all invoiced charges are correct as per this Contract. Only properly submitted invoices will be officially processed for payment. Prompt payment requires that your invoices be clear and complete in conformity with the instructions below. All invoices must be itemized showing:

  - Contractor name
  - remit to address
  - purchase order number
  - release number if given
  - date of order/release
  - item manufacturer’s name or abbreviation (if applicable)
  - complete item description including catalog, model and/or stock number(s) identical to those stated in proposal
  - prices per the Contract

  At the discretion of Purchasing, invoices not reflecting the correct discount or net prices may be short paid or disputed. The original invoice must be sent to the address provided in the BILLING INFORMATION section of the Purchase Order.

- Purchasing Card:

  Order confirmation shall contain the same detail as listed for purchase orders and should be sent to the address given at the time the order is placed. *Any fees charged for use of the University’s purchasing card program are not allowed.*

2.8 Refund of Credits:

The contractor agrees to pay the state within 60 days, at the state's request, any credits resulting from the order which the state determines cannot be applied to future invoices.

2.9 Invoice Dispute:

Pursuant 16.528(3)(e) the UW System will notify supplier by e-mail or mail, at its discretion, of any disputed invoice.

2.10 Requirements for Criminal Background Checks:

This contract is contingent upon, Contractor supplying workers who have passed a criminal background check that includes a national criminal background check database demonstrating the worker has no convictions or pending criminal charges that are substantially related to the contracted-for activities or services, including but not limited to, those that would render the worker unsuitable for regular contact with children. Disqualifying convictions or charges include, but are not limited to, sexual offenses, violent offenses, and drug offenses.

2.11 Mandatory Reporting of Child Abuse or Neglect:

If, in the course of providing services to the UW, Contractor (or its employee) observes an incident or threat of child abuse or neglect, or learns of an incident or threat of child abuse or neglect, and the Contractor (or its employee) has reasonable cause to believe that child abuse or neglect has occurred or will occur, Contractor must make a report of that abuse or neglect to law enforcement or to a county social service agency as provided in UW's Policy on Mandatory Reporting of Child Abuse and Neglect ("the Policy"). If the suspected child abuse or neglect involves an allegation against a UW employee or agent (e.g. student, volunteer, contractor, etc.), or the incident or threat of child abuse or neglect occurred on a UW campus or during a UW-sponsored event, the Contractor shall also report to the Police Department.

2.12 Travel Per Diems:

All of the Contractor's travel and per diem expenses shall be the Contractor's sole responsibility. Payment to the Contractor by the University shall not include an additional amount for this purpose.

2.13 Accessibility of Web Content and Mobile Applications:

For all products or services provided pursuant to this Agreement, the Vendor shall comply with the American with Disabilities Act (ADA) in a manner consistent with the W3C Web Content Accessibility Guidelines (WCAG), version 2.1 ("WCAG 2.1"), at conformance level AA. If the Product does not fully conform to WCAG 2.1 Level AA, the Vendor shall inform the University of non-conformance prior to the execution of this Agreement and shall provide a plan and timeline to achieve conformance and develop a conforming alternate version that complies with WCAG 2.1 Level AA. If, during the Term of this Agreement, the Vendor fails to maintain compliance with WCAG 2.1 Level AA, or the University identifies an accessibility barrier in a product or service that renders the product or service inaccessible or unusable to people with disabilities, the University shall notify the Vendor of non-compliance. If the Vendor does not achieve product or service accessibility in conformance with WCAG 2.1 Level AA within 7 days of the Vendor receiving the notification of non-compliance ("Notice"), the Vendor and the University shall meet and mutually agree upon an appropriate resolution of the accessibility barrier(s), including a timeline for resolution and any damages for which the Vendor may be responsible. Should Vendor: (i) fail to acknowledge receipt of the Notice within 7 days of receipt of the Notice or (ii) fail to materially resolve the accessibility barrier(s) within the agreed-upon timeline, Vendor agrees to indemnify and hold harmless University from any claims arising out of its failure to comply with the aforesaid requirements. Failure to comply with these requirements shall constitute a material breach and may be grounds for termination of this Agreement by the University.

2.14 Acceptance and Test (Post Award):

Acceptance testing will occur within 60 days after the item/service has been installed. Acceptance testing will be performed by the University and will consist of verification of the specifications and performance requirements.

If the item/service does not meet specification or performance requirements, the Contractor will have 30 days to meet requirements. If after this time period the item/service still does not meet specifications or performance requirements, the Contractor agrees to remove the item and return any payments that may have been made.

Darren Ward, or a designee, is the only authorized person who may sign an acceptance form. The warranty period will begin following the successful acceptance testing.

2.15 Insurance:

The Contractor shall maintain insurance levels as required in the DOA 3054 Standard Terms and Conditions – Section 23.0. A certificate of insurance must be provided upon request.

	Coverage Type	Minimum Limit
A.	Worker's Compensation	Statutory Limits
B.	Commercial General Liability Each Occurrence	$1,000,000
	Gen. Aggr. Incl. Prdts/CO	$2,000,000
C.	Automobile Liability Combined Single Limit	$1,000,000
D.	Additional Insured Provision: The contractor shall add the "Board of Regents of the University of Wisconsin System, its officers, employees, and agents" as an additional insured under the commercial general liability policy.	

The Contractor shall add: "The Board of Regents of the University of Wisconsin System, its officers, employees and agents" as an 'additional insured' under the commercial general and automobile liability policies. The certificate holder shall be listed as the University of Wisconsin-System Administration or System campus for their respective purchases.

2.16 Activity Reports:

Contractor must be able to report annually, or as requested, for all items/services purchased against this contract during the designated report period, including but not limited to:

- Date of order/release
- Item manufacturer's name or abbreviation (if applicable)
- Complete item description including catalog, model and/or stock number(s) identical to those stated in proposal
- Prices per the Contract

2.17 Record and Audit:

The Contractor shall establish, maintain, report as needed, and submit upon request records of all transactions conducted under the contract. All records must be kept in accordance with generally accepted accounting procedures. All procedures must be in accordance with federal, State of Wisconsin and local ordinances.

The University shall have the right to audit, review, examine, copy, and transcribe any pertinent records or documents held by the Contractor related to this contract. The Contractor shall retain all applicable documents for a period of not less than five years after the final contract payment is made. The University reserves the right to inspect any facilities used to support this Contract.

2.18 Performance Meetings:

The Account Representative and/or Proposers Contract Administrator must be available to meet as required with the University's Buyer to evaluate contract implementation and performance and to identify continuous improvement.

2.19 Subcontracting:

- Any Contract resulting from this proposal shall not be, in whole or in part, subcontracted, assigned, or otherwise transferred to any Subcontractor without prior written approval by Purchasing. Upon request Contractor must provide Subcontractor's complete contact information including EIN# (TIN#, SS#) and signed W-9.
- The Contractor shall be directly responsible for any subcontractor's performance and work quality when used by the Contractor to carry out the scope of the job. University reserves the right to assess Contractor damages in excess of the contract amount for Subcontractor's failure to perform or inability to complete required project milestones.
- Subcontractors must abide by all terms and conditions under this Contract.

2.20 Fair Price Analysis:

Purchases made under this contract may require further fair price analysis. The awarded Proposer will be required to provide documentation (i.e. published price list, list of previous buyers, etc.) to allow the University to complete this analysis.

2.21 Severability:

If any provision of this contract shall be, or shall be adjudged to be, unlawful or contrary to public policy, then that provision shall be deemed to be null and separable from the remaining provisions and shall in no way affect the validity of this contract.

2.22 Discriminatory Boycott of Israel

Effective October 27, 2017, consistent with 2017 Wisconsin Executive Order 261, contractor agrees it is not engaged in a boycott of the State of Israel and further, contractor with not during the term of the contract engage in a boycott of the State of Israel. State agencies may not execute a contact and reserve the right to terminate an existing contract with a business entity that is not compliant with this provision. This provision applies to all contracts of all values.

2.23 Environmentally Friendly ("Green") Product:

Contractors are encouraged to identify products that are made of recycled products, that use environmentally friendly production methods, or that can be recycled at the end of their service life. The University will make every effort to purchase "Green" products wherever feasible or possible based on individual project needs and funding available.

2.24 Electronic Commerce/Online Ordering:

Customers of this contract may want to take advantage of electronic ordering and "E-Commerce" opportunities that may be offered by the Contractor. All electronic orders shall receive contract pricing and/or discounts.

2.25 Promotional Materials/Endorsements:

Contractor agrees that they will not use any promotional or marketing material which states expressly, or implies that, the University endorses either the Proposer or any party related to the Contractor or this Contract.

2.26 Additional Items/Services:

Similar items/services may be added to this Contract provided it is mutually agreeable to both Purchasing Services and the Contractor. Scope of work and pricing (including discounts) must be consistent with the current contract items/services.

2.27 Special Pandemic and Emergency Operations Considerations:

The University of Wisconsin System, individual campuses, municipalities, counties, or the State or Federal government may have emergency orders or guidelines in place mandating or recommending measures such as face masks, protective gear, hand washing, temperature checks, symptom reporting, social distancing, or other temporary public health and safety measures. All suppliers visiting UW campuses or participating in UW sponsored activities, whether on or off campus, must comply with all relevant University, campus, government, and public health and safety mandates and guidelines unless specifically exempted by the applicable legislation, executive order or public health order. UW reserves the right to impose additional health and safety requirements, processes, and procedures at any time. Proposers, contractors and suppliers and their support personnel present in person at any UW site or event must comply with all such applicable measures in effect at that location.

3. Requirements and Specifications

3.1 Requirements:

Requirements that include the word "must" or "shall" describe a mandatory requirement. Failure to meet a mandatory requirement will disqualify your proposal.

Bidder shall indicate agreement to all Mandatory Questions and Specifications in the ShopUW+ Sourcing Event Module Sections Group 1.1 to 3.7.2 12 to meet the minimum acceptable specifications for the items/services desired.

ONLY proposals submitted by Proposers that meet all mandatory specifications will be considered for evaluation.

NOTE: Failure to respond to all items in this section may be deemed as sufficient reason to reject a proposal. Format your response to correspond numerically with the items listed below.

3.2 Purchased Services – USA Requirement (Mandatory):

The State of Wisconsin requires purchased contractual services to be performed in the United States. Some exceptions apply, including procurements subject to the conditions of the World Trade Organization Government Procurement Agreement (WTOGPA) and those listed in (Wis. Stats. 16.705 (1r). Subject to these exceptions, Contractor warrants that the services provided to the University under this contract will be performed in the United States. The inability to perform required services in the United States shall be grounds for disqualifying your proposal for this contract.

3.3 FERPA – University of Wisconsin institutions are subject to legal obligations with respect to privacy of student information. (Mandatory):

The vendor must acknowledge that the UW institution data may include personally identifiable student education records ("Education Records"), as defined by the Family Educational Rights and Privacy Act.

To the extent that UW institutional includes Education Records, the vendor must acknowledge and agree that (i) the vendor shall be deemed to be a "University Official" with respect to the vendor's use and handling of Education Records; (ii) the vendor shall be under the institution's direct control with respect to use and maintenance the handling of Education Records; and (iii) without limiting any other provision the agreement, the vendor may not disclose the information to any third party without the prior written consent of the student as required by FERPA. The vendor shall also take any action reasonably requested by the institution to adhere to its obligations under FERPA or otherwise protect the privacy and confidentiality of Education Records.

3.4 Does your complete solution as proposed meet all University of Wisconsin Information series 1000 Security Policy requirements? (Mandatory)

Contractor must submit with their RFP response a full Higher Education Community Vendor Assessment Tool (HECVAT) 3.0 or higher

3.5 Does your entire solution as proposed comply with WCAG 2.1 Level AA accessibility Standards? (Mandatory)

Contractor must submit with their response a completed Voluntary Product Accessibility Template (VPAT)

3.6 The awarded vendor must provide the following services and have done so for the past two years (Mandatory):

3.6.1 Does your firm have experience supporting higher education social media or enrollment marketing initiatives?

3.6.2 Does your firm clearly define and provide a transparent fee structure for all proposed services?

3.6.3 Does your firm have the ability to launch services within 30 days of contract execution?

3.6.4 Does your firm support campaign launches on a rolling basis without requiring alignment with academic terms or semester start dates?

3.6.5 Does your firm develop and execute strategic, comprehensive marketing campaigns aligned with institutional goals, messaging and brand standards?

3.6.6 Does your firm provide in-house creative production?

3.6.7 Does your firm develop platform-specific strategies and creative assets tailored to individual social media platforms?

3.6.8 Does your firm support integrated campaigns across multiple channels (i.e. web, email, social media, and digital advertising)?

3.6.9 Does your firm develop audience-specific messaging informed by research, surveys, behavioral insights and/or campaign data?

3.6.10 Does your firm provide campaign performance and ROI tracking throughout all stages of campaign execution?

3.6.11 Does your firm ensure all communications and campaign assets are optimized for mobile devices?

3.6.12 Does your firm maintain consistent file formats for required data uploads and downloads throughout the contract period?

3.6.13 Does your firm support secure data transfer methods, including SFTP or equivalent?

3.6.14 Does your platform support API and/or file-based integration?

3.7 Assigned Point Values for UW-Stout Polytechnic Social Media Marketing

Please upload your completed response to Section 3.7 of the REQUIREMENTS AND SPECIFICATIONS below in an attachment which should, in a detailed explicit manner, describe your organization's ability to meet and effectively deliver the requirements of this solicitation. NOTE: The file uploaded into **Sourcing Event Module Section 3.1.2** will require bidder to enter a title for the document. Follow the provided naming convention: Supplier Name_Proposal Response.

RFP Section	3.7.1 Company Information	Max Score
3.7.1.1	Describe your firm's organizational structure, including company size, locations, years in business, ownership structure (public or private), and core areas of expertise related to social media, digital marketing, enrollment marketing, and/or student engagement services. Include: • number of employees • years supporting the proposed services • any mergers, acquisitions, or major organizational changes within the past three years	25

3.7.1.2	Identify the key team members who would be assigned to this account, including roles, responsibilities, and relevant experience, especially as it relates to higher education.	25
3.7.1.3	Describe your account management structure and how day-to-day communication and project oversight are handled. Also address expectations around responsiveness and issue escalation procedures.	25
3.7.1.4	Provide information regarding any significant client contract cancellations or non-renewals experienced within the past three years and describe the circumstances, if applicable.	25
3.7.1.5	Describe your firm's experience supporting institutions of higher education comparable in size, mission and complexity to the Universities of Wisconsin member institutions Provide at least three (3) client references including: ● institution name ● contact name and title ● phone number ● email address ● scope of services provided	50
3.7.1.6	Provide a statement describing why your firm is uniquely qualified to support Universities of Wisconsin member institutions goals and how your services differ from competitors. Include: ● your understanding of current higher education marketing and enrollment challenges ● how your organization approaches evolving student communication behaviors ● any differentiators related to strategy, technology, analytics, or creative services ● directly address UW-Stout Polytechnic's polytechnic mission as a differentiator from other member institutions	100
3.7.1.7	Describe your organization's technology, software, reporting, and service strategies, including any strategic partnerships, integrations, or third-party collaborations that support service delivery. ● Describe your framework for system integration, including Customer Resource Management (CRM), Business Intelligence (BI), and Student Information Systems (SIS). Include documentation of the available APIs and file-based integrations ● Provide examples of systems you have integrated with (i.e. PeopleSoft, Salesforce, Slate, etc.)	50
3.7.1.8	Describe any discounts available to UW-Stout Polytechnic for each additional UW System Institution(s) that use the results of this RFP. Include specific discounts or percentages as they apply.	25
3.7.1.9	Provide a detailed overview of your pricing model and the different cost structures you provide (i.e., price per action, flat rate pricing, etc.)	75
3.7.1.10	It is the preference of UW-Stout Polytechnic to pay after census (10 days) for enrollment campaigns. Will you honor this preference and if not describe your payment structure for these campaigns.	75

3.7.2.11	Describe the strengths of your organization and any unique services, tools, technologies, or methodologies that differentiate your approach to student re-engagement and enrollment marketing.	75
	Sub-Total	550
	3.7.2 Scope of Work	
3.7.2.1	Describe your process for onboarding, discovery, and gathering institutional information necessary to support campaign strategy and execution. Include: ● information requested from the university ● onboarding timeline ● file transfer methods ● collaboration expectations	75
3.7.2.2	Describe your strategies for identifying, prioritizing, segmenting, and engaging student populations for outreach efforts. Include: ● prioritization logic ● audience segmentation strategies ● minimum audience size requirements, if any	50
3.7.2.3	Describe your organization's experience developing audience-specific messaging strategies for distinct higher education audiences, including: • prospective students • transfer students • adult learners • graduate students • parents/supporters ● alumni ● non-degree seeking learners (including those pursuing certificates or credentials for upskilling) Include examples of how communication approaches differ by audience.	100
3.7.2.4	Describe your approach to developing and deploying student outreach and re-engagement campaigns across multiple communication channels. Include: ● communication cadence ● channel selection ● message personalization ● campaign sequencing ● audience behavior considerations	100
3.7.2.5	Describe your organization's approach to platform-specific social media strategy and content development.	100

	Include how creative, messaging, and campaign tactics differ across platforms such as: ● Instagram ● TikTok ● LinkedIn ● YouTube ● Facebook ● Snapchat ● emerging platforms	
3.7.2.6	Describe your approach to developing integrated campaigns across web, email, social media, paid media, geo-targeting, and related digital how messaging and performance are coordinated across channels.	75
3.7.2.7	Describe your approach to creating content for social media and digital marketing campaigns. Explain how you ensure adherence to brand standards and messaging consistency. Include examples of the types of content your organization produces.	75
3.7.2.8	Describe your organization's approach to artificial intelligence (AI), including how AI is incorporated into your creative, marketing and communication processes. Include how you ensure responsible use of AI, including human oversight, data privacy, and quality control.	50
3.7.2.9	Describe your reporting tools, dashboards, analytics capabilities, and approach to measuring campaign success. Include: ● KPIs and performance benchmarks ● reporting methodologies and reporting frequency ● level of client access to campaign performance data ● dashboard availability and customization ● A/B testing and optimization practices ● examples of how performance insights are used to improve campaign outcomes Provide sample reports, if available.	100
3.7.2.10	What trends or emerging issues do you believe are currently impacting: ● student persistence ● stop-out behavior ● re-enrollment efforts ● communication preferences among stopped-out students	50
3.7.2.11	Describe your understanding of UW-Stout Polytechnic, including opportunities and challenges related to student engagement, stop-out recovery, persistence, and re-enrollment. Include: ● how your organization would learn more about UW-Stout Polytechnic ● information needed to begin work successfully ● recommended early priorities	50

3.7.2.12	Describe in detail any additional tools or services your firm could provide to UW-Stout Polytechnic, other than those services listed in this RFP.	75
	Sub-Total	900
	Total	**1450**
	Cost Score	
	Total Cost	200
	Overall Score	**1650**

4. Evaluation and Award of Contract(s)

4.1 Proposal Scoring:

Proposals meeting mandatory requirements will be reviewed by an evaluation committee and scored against the stated criteria. If no proposer is able to comply with a given specification or mandatory requirement, Purchasing reserves the right to delete that specification or mandatory requirement. In the event that all proposers do not meet one or more of the mandatory requirements, Purchasing reserves the right to continue the evaluation of the proposals and to select the proposal which most closely meets the requirements specified in this RFP. The committee may, at its sole discretion, review references, request oral presentations, and conduct an on-site visit and use the results in scoring the proposals. Proposals from certified Minority Business Enterprises or Disabled Veteran-Owned businesses may have points weighted by a factor 1.05 to provide a five percent (5%) preference to these businesses (Wis. Stats. 16.75(3m)). The evaluation committee's scoring will be tabulated and proposals ranked based on the numerical scores calculated.

4.2 Scoring Criteria and Method:

For each response required of the Proposer, the points provided in parentheses represents the total possible points available for each response. The responses will be evaluated based on the relative merits to the needs of the University (rather than relative to competing Proposer's responses). The proposals will be scored independently by each committee member and the resulting scores will be averaged to determine the highest scoring proposal.

Pricing

- The lowest priced proposal will receive 100% of the allotted cost points. All other proposals will be scored using the formula as follows:

$$\frac{\text{Lowest Proposed Cost}}{\text{Other Proposer's Cost } \textit{(Varies according to proposal being scored)}} \times \text{Maximum evaluation points given to cost} = \text{SCORE}$$

  Calculation of points awarded to subsequent proposals will use the lowest dollar proposal amount as a constant numerator and the dollar amount of the firm being scored as the denominator. This result will always be less than one. The result is then multiplied by the number of points given to the cost section of the RFP.
- For all other non-pricing related responses, points will be awarded relative to the needs of the State of Wisconsin, as solely determined by the evaluation committee members.

Points

Evaluation and selection of a proposal will be based on the assignment of points by the evaluation committee which is then combined with the Cost Proposal points for a final score. (See Point Matrix below.)

Points Matrix	**Points Available**
Purchased Services - USA Requirement	Mandatory
3.6.1 Company Information	550 Points
3.6.2 Scope of Work	900 Points
Total Technical Possible	**1450 points**
Cost Proposal	200 points
Total Possible Cost Score	**200 points**

Maximum Possible Total Score	**1650 points**

Only proposals that have received 800 points or greater on the Technical Specifications, will have the Cost Proposals scored. A proposal that receives less than 800 points on the Technical Specifications will be ineligible for further consideration.

4.3 Best and Final Offers:

At the sole discretion of the University, those proposer(s) most likely to be awarded a contract may be requested to submit a Best and Final Offer in order to further clarify the deliverables, contract language, or costs presented in the Proposer's RFP. If Best and Final Offers are requested, they will be evaluated against the stated criteria. There is no obligation on the part of the University to request Best and Final Offers from any or all of the proposers responding to the RFP.

4.4 Contract Award:

A Contract will be awarded to the highest scoring proposal providing contract negotiations with the proposer are successful.

4.5 Notification of Award:

All proposers who respond to this RFP will be notified, in writing, of the University's award contract(s) as a result of this RFP. After notification by Purchasing of the **intent to award**, file copies of proposals will be available for public inspection. Proposers must schedule document inspection with the Buyer responsible for managing this RFP.

Please be aware that contracts with private, profit-making organizations with a value of more than $1,000,000 requires formal approval by the Board of Regents prior to execution. Therefore, the intent to award is conditional upon the Board of Regents approval.