



MIDWESTERN HIGHER EDUCATION COMPACT

Higher Education Information Technology Solutions (HEITS) for Data (document) Management Needs

Request for Proposal

Prepared by the
Midwestern Higher Education Compact
Technologies Committee
March 2016

SPECIAL NOTE: This Request for Proposal (RFP) does not obligate the Midwestern Higher Education Compact (MHEC) or member states to award a contract and reserves the right to cancel this RFP if it is considered to be in its best interest. Proposals must be clear and concise. Proposals that are difficult to follow or that do not conform to the RFP format or binding specifications may be rejected. MHEC reserves the right to change the evaluation criteria or any other provision in this RFP by posting notice of the changes on MHEC's public website at <http://MHEC.ORG/RFPs>. For this RFP, posting on the captioned website above constitutes written notification to each vendor. Vendors should check the site daily and are expected to review information on the site carefully before submitting a final proposal.

*Data (document) Management Needs
Request for Proposal
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A. Introduction

The Midwestern Higher Education Compact (MHEC) through its Data Management Subcommittee of its Technologies Committee is competitively soliciting proposals on behalf of MHEC. The purpose of this Request For Proposal (hereafter called RFP) is to establish one or more MHEC Master Price Agreement(s) with qualified vendor(s) for Higher Education Information Technology Solutions (HEITS) for Data (document) Management Needs in accordance with the specifications of this RFP.

At a minimum the vendor(s) proposed offering shall be available for all eligible participants in the twelve (12) Midwestern state region of the Compact. MHEC will also entertain proposals to expand proposed offering to states within the other three Compacts in the country; the New England Board of Higher Education (NEBHE), the Southern Regional Education Board (SREB), and the Western Interstate Commission for Higher Education (WICHE); subject to each respective Compacts' approval.

For the purposes of this RFP, the definition of a 'document' is very broad. A document might, and should, include things such as video auditions, retention records, electronic documents such as email or eforms, documents produced by various ERP systems, and of course, paper records. So a document for the purpose of this RFP is the data that the institutions need to capture and manage, no matter what the format.

It also should be noted that the majority of Higher Education institutions continue to face budget uncertainties challenges; therefore all proposals should strive to deliver cost-effective solutions. Bear in mind that what is cost-effective for a large institution is NOT cost-effective for a small one, and both needs should be addressed.

The Higher Education Information Technology Solutions (HEITS) for Data (document) Management Needs seeks solutions to the following Higher Education challenges. Please note that every potential iteration of a problem area will NOT be described, the intent is only to provide a sampling of the common challenges higher education institutions are all facing where it is hoped that vendors may have solutions with good congruence. Responses may address other challenges so long as they fall within the scope of the intent of this RFP.

1. Facilitate the workflows that Higher Education needs to have the ability to efficiently share/transmit information. Possible keywords: integration, workflow automation, secure access, equipment, electronic signature. Examples:
 - a. The ability to take digitally submitted data (i.e. self-service web form data) and attach to or create record in ERP systems. For example, online prospective student information process: Students typically start to engage with an institution by submitting a request for information or an online application. The information captured in this process is the beginning of the student record. As the prospective student continues to interact with the institution, the data associated with that student will grow and will eventually become part of the official student record if the individual matriculates at the institution. This data will be therefore be used by recruiters, student information systems, financial aid offices, admissions offices and others. Similar needs exist in the human resource processes with applications and hiring processes.

- b. Standardization to support essential complex operations and/or workflows. Examples; Human resources needs a process to gather documents from prospective adjunct instructors and tie those records to our ERP or a recruitment tool thus creating a pool of possible adjunct instructors. This pool will then be shared with the appropriate Deans.
 - c. Simplify the process of routing/approving purchase orders and invoices for Finance departments. Financial Aid and Admissions have check lists in the Student Information System (SIS) that are dependent on gathering documents from the student. Electronic gathering of documents and notifications desired.
 - d. Increase productivity through implementation of highly governed workflows to impose document management best practices, including uniform file structures across records, template-based forms, automated file submission, and distribution, sharing and searching based on fixed metadata and user permissions.
 - e. Put meaningful data in the hands of senior level executives in order to facilitate various predictions, projection and planning needs. Create efficiencies and provide access to documents/data for decision making – create a knowledge base.
 - f. Trackable workflows that allow the institution to monitor progress, expedite handling when needed, and run reports to identify possible barriers to efficiencies.
2. Simplify the handling of the myriad types of higher education data, where it exists or resides, and who would need to access the data (or need to NOT be able to access the data). Possible keywords: Secure access, document conversion, storage, equipment needs, and format. Examples:
- a. Reduce file storage requirements and costs through the aggregation of files in a centralized, shared repository, eliminating file duplication in multiple locations, reduce the size and volume of email attachments, minimize the use of shared server folders to store files, minimize the use of non-document management systems and non-accessible user digital storage.
 - b. Reduce the labor intensive activities currently needed to comply with regulatory reporting.
 - c. Data security – which includes such things as secure disposal of hardware and documents.
 - d. Workflow and data transfer between document imaging and various ERP systems
 - e. eFiling / less paper - efficiencies
3. Streamline records handling, with an understanding of data requirements that higher education is mandated to comply with, such as policy requirements, retention requirements, and regulatory requirements/reporting. Possible keywords: Secure access, storage, records, retention, policy, open records. Examples:
- a. Manage archival and record retention policies. For example, records of purchases are usually required to be retained for at least 5 years after the final transaction date. The purchase orders must be identified, assigned a destruction date appropriate to the documents, and then stored securely.

The documents must be accessible from storage if needed, and be readily locatable. In many institutions, these records are kept in paper form in file cabinets, and are retained far longer than the required retention period. Other types of records subject to retention regulations could include student records, personnel records, medical records, law enforcement documents, board records, and contracts.

- b. Minimize discovery efforts relative to document research, open records requests, and archived records.
- c. Contractual repositories (and other things similar to contractual repositories).

B. Higher Education Technology Information Technology Solution

A Higher Education Information Technology Solution (HEITS) is defined as an offering that (a) is designed to fully address a specific type of higher education need, (b) can be adjusted where appropriate to meet the specific implementation criteria of the Compacts eligible institution's, and (c) is designed to grow as the institutional needs in the solution area grow. A Higher Education Information Technology Solution (HEITS) is NOT simply a package of hardware, software, IT as a Service (ITaaS), managed services, or other related services that are listed in a vendor's product and services catalog. It is a comprehensive, well-considered innovative APPROACH to meeting one or more specific needs of Higher Education.

The purpose of this HEITS RFP is to introduce a philosophy/methodology of entering into a master price agreement that is flexible enough to allow eligible Higher Education participants to design and purchase a HEITS solution in a timely fashion via this contract vehicle that best meets the institutions business needs. Solutions presented in this HEITS RFP are NOT intended to replace more traditional purchasing contracts such as a contract for desktop computers or tablets, nor is this RFP intended to limit competition for any individual element that is part of the solution. In other words, if a solution includes desktop computers the successful contractor(s) would not be authorized to quote a single desktop computer, and MHEC would still be able issue a bid for desktop computers and award some without being in conflict with this RFP.

For higher education institutions in the Midwestern region of the United States, there are certain commonalties that all are working to address. When preparing your proposal(s), remember to address these key commonalties, as HEITS that do so will be well situated to succeed in the higher education market.

With the explosion of IT solutions in business, academic and research areas, higher education institutions are struggling to achieve a balance between openness and individual/departmental autonomy, and security and cost-effectiveness. Higher education has long placed autonomy ahead of control to provide faculty with an environment conducive to scholarship and discovery. Yet academic autonomy has resulted in duplicative and extensively customized business systems while the lines between administrative and academic technologies and users have blurred. The pressures of budget constraints, security challenges, opportunities provided by new technologies, and the desire to apply analytics techniques to data housed across disparate systems have combined to force higher education administration and IT leaders to look for ways to streamline these activities to achieve efficiencies for the benefit of the institution. This push/pull is present in almost every transaction, and those who understand this dynamic will be positioned to perform well in the higher education market.

Another central theme is collaboration. Higher education institutions need an IT architecture that works for the entire institution, that optimizes the use of technology in teaching and learning, and that allows them to quickly and efficiently manage change. Higher education institutions need to optimize the use of technology in teaching and learning, to ensure that information technology is delivering the best value, to standardize and optimize processes, to implement change, to develop effective IT funding models, to use institutional data most effectively, and to promote good information security. At the same time, there is a persistent and growing need for effective security, as well as secure and robust cross-institutional efforts for research and scholarly activities. Higher education is looking for innovative vendors that are less focused on the immediate transaction and vendors that will understand and meet the more interdependent needs that are becoming commonplace.

C. The Midwestern Higher Education Compact

The Midwestern Higher Education Compact (MHEC) is an instrumentality of twelve Midwestern states (Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin). The Compact was legislatively established in 1991 through a common statute enacted into law by each of the member states. The purpose of the Compact is to promote higher education through interstate cooperation and resource sharing.

A 60-member Commission composed of five delegates from each state who are appointed by their respective Governors, House Speakers and Senate Presidents governs the Compact. The Commission has been conferred very broad authority to enact solutions and enter into agreements on behalf of its member states. Once a state enacts the necessary legislation to become a member of the Compact, all of the public and private non-profit colleges, universities, community colleges and technical colleges in the state are eligible to participate in the solutions established by the Compact. The Commission receives its primary financial support from member state appropriations, from foundations having special interests in specific solutions, and from administrative service fees.

The primary constituents served by the Midwestern Higher Education Compact are the approximately 1000 public and private non-profit institutions in the member states whose combined enrollments total over four (4) million students. In addition, where appropriate, state government agencies and local school districts are also invited to participate in MHEC solutions. Faculty, staff, and students may also be eligible to purchase under a MHEC agreement, depending on the terms negotiated.

One of the Compact's top priorities is to establish public-private relationships to improve services to higher education, and reduce administrative costs for both providers and institutions. Since 1991, the Compact has engaged in several highly successful initiatives in cooperation with leading corporations. These relationships have been quite innovative, and have produced financial benefits for all of the involved parties. Beyond excellent pricing and terms, MHEC agreements deliver a primary benefit to institutions and vendors by avoiding the time and expense of the RFP process since MHEC has already completed the RFP and awarded the contract on behalf of all institutions in the twelve states.

D. The MHEC Technologies Committee

MHEC's Technologies Committee broadly represents higher education technology experts and IT procurement professionals who promote collaboration amongst the Midwestern states and institutions in technology related areas for the purpose of furthering education opportunities and services in the region. The committee is charged by the Commission with identifying, soliciting, executing, and maintaining cost savings solutions for hardware, software, and services used by eligible organizations. From this larger committee, smaller working group committees continue to focus on specific solution initiatives. As one of these working groups, the Data Management Subcommittee is responsible for developing this RFP.

E. Scope of Solicitation

The MHEC Data Management Subcommittee's intent is to competitively solicit one or more solution providers for Higher Education Information Technology Solutions (HEITS) Data (document) Management Needs for eligible organizations.

In addition to the applicable products, IT as a Service (ITaaS), managed services, or other related services; any proposed solution needs to have as options: implementation costs, consulting fees, maintenance, technical support, and training to the extent necessary to allow the eligible organization(s) to fully utilize the purchased solution. Because eligible organizations have differing Data (document) Management Needs, the solution must be flexible enough to meet those varying needs. Amongst different types of eligible organizations and even within a single eligible organization, differences in requirements exist. Therefore, the solution should allow adaptation to the specific needs and circumstances of each eligible organization as well as streamline and simplify the procurement and distribution process for them.

The successful respondent(s) will be responsible for delivery of all products and services awarded. Respondents may propose the use of servicing subcontractors or resellers. However, MHEC will consider the respondent(s) to be the sole point of contact with regard to contractual matters, including pricing structure, delivery, warranty, and payment of any and all charges resulting from the purchase of products and services specified in this proposal, unless a separate contract addendum to the master price agreement is executed with said subcontractors or resellers. If subcontractors or resellers are utilized, MHEC encourages the consideration of minority owned and/or economically disadvantaged businesses.

The solution will:

1. Be designed as a renewable multiple-year offering with the capability of serving the entire MHEC region and optional NEBHE, SREB, and WICHE regions;
2. Offer eligible organizations a streamlined and simplified procurement process for a solution that meets Data (document) Management Needs;
3. Make available a comprehensive Data (document) Management Needs solution that is flexible enough to adapt to the specific needs and circumstances of each eligible organization;
4. Assist eligible organizations in the conversion, installation, training and support of the respondents products as necessary;
5. Be structured to enable institutions, consortia of institutions, and systems in MHEC member states to participate as they deem appropriate and in their own best interests.

Depending upon the responses received and the solutions presented, the Data Management Subcommittee may select more than one vendor to work with in developing and implementing a Data (document) Management Needs solution(s).

F. Eligible Organizations

All public and private non-profit colleges, universities, community colleges, technical colleges and higher education agencies in MHEC member states shall be eligible to participate in the MHEC for Higher Education Information Technology Solutions (HEITS) Data (document) Management Needs.

Optionally, participation may be offered to any or all of the following entities:

- K-12 schools and districts, including public libraries;
- cities, counties, and local subdivisions;
- state agencies;
- faculty, staff, and students for any or all of the above groups

Contract benefits may differ for each of these optional groups.

MHEC will also entertain proposals to expand this solution to states within the other three Compact's in the country; NEBHE, SREB, and WICHE subject to the respective Compacts' approval.

- **MHEC** member states are Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.
- **NEBHE** member states are Connecticut, New Hampshire, Maine, Massachusetts, Rhode Island, and Vermont.
- **SREB** member states are Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.
- **WICHE** member states are Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming, U.S. Pacific Territories, and Freely Associated States.

G. The Request For Proposal (RFP)

In preparing responses to this RFP, prospective providers are asked to:

- Demonstrate an understanding of higher education environments, including but not limited to the open network environments necessitated by research and academic freedom concerns, budget constraints, and governance processes;
- Describe how the proposal embodies a holistic solution;
- Describe how the proposal will benefit higher education (show tangible outcomes);
- Demonstrate efficiency, effectiveness, and cost savings throughout the life cycle of the proposed solution;
- Describe and demonstrate the strategies that would be employed to assure the solution's success, including potential rollout and marketing; and
- Describe the qualifications and unique features that of the proposed solution.

As used in this RFP, the terms "must", "shall", "should" and "may" identify the criticality of requirements. "Must" and "shall" terms are considered mandatory requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as "should" or "may" are highly desirable, although their absence will not have as

large an impact and as requirements labeled as mandatory. Depending on the overall response to the RFP, some individual mandatory items may not be fully satisfied, but it is the intent to satisfy most, if not all, mandatory requirements. The inability of a respondent to satisfy a mandatory requirement does not automatically remove that Respondent from consideration; however, failure to raise issue related to any of the requirements may seriously affect the overall rating of the respondent's proposal.

Responses must be keyed to the section and paragraph numbers provided in this RFP.

1. General Information and Qualifications

- 1a. The successful contractor(s) shall provide products, software, maintenance, installation, training and service solution(s) as described in Respondent's proposal. It shall be the respondent's responsibility to make certain that all hardware, software, services, and support is included in their proposal to guarantee a fully functional solution. It shall be the contractor's responsibility to verify that any solution proposed will work as specified in the Eligible Organization's environment.
- 1b. The successful contractor must warranty all products and ensure that this product works to its maximum capacity for a minimum period of twelve (12) months after final acceptance by the Eligible Organization that purchased it.
- 1c. The successful contractor must agree that additional MHEC HEITS Data (document) Management Needs RFP for attaining the Eligible Organizations' solution that is not covered herein, but within the scope of this RFP, maybe added to this contract without voiding provisions of the existing contract.
- 1d. The bidder's order fulfillment process shall be considered an important process with regard to the existing business practices of Eligible Organizations. To that end invoices must be received separately for Eligible Organizations business units. The contractor's order fulfillment system must work seamlessly in conjunction with common ERP system and/or purchasing card systems that Eligible Organizations may choose to use.
- 1e. Delivery of purchases will be made within 30 calendar days after receipt of order, or such other length of time as mutually agreed between the participating Eligible Organization and the Vendor, F.O.B. destination (interior/ground floor or inside dock), and freight pre-paid and allowed, to any and all locations of the Eligible Organization. Bid prices must include all packing, freight, insurance charges and installation/operation manuals.
- 1f. Contractor agrees to notify the Eligible Organization within five (5) working days after receipt of the order if they are unable to deliver within the required time frame. Failure of the contractor to adhere to delivery schedules as specified or to promptly replace defective product shall be considered a default with Eligible Organization retaining any and all remedies available to it under the law. Respondents need note that all locations of any particular Eligible Organization may not be within the Compact's region.
- 1g. As some Eligible Organizations have locations outside North America, contractors must also provide expected delivery times outside of North America.
- 1h. Purchase orders referencing the MHEC contract number, will be placed by each Eligible Organization, on their institution's Purchase Order Form or by using a credit card on the vendor-supplied purchasing web site, or other mutually agreed-upon means.
- 1i. Contractors may choose to deliver products electronically where practicable. This option must be under the independent control of each Eligible Organization.

- 1j. Contractor(s) must not substitute any item(s) that has been ordered by the Eligible Organization using this contract without the prior written or electronic approval by the appropriate purchasing officer of the Eligible Organization. The substitute item must be at the same or better technology level than the original product ordered, and pricing at the same or lower price. Failure to comply may result in return of merchandise at contractor's expense.
- 1k. Successful contractor(s) must offer a "total satisfaction" return policy. The contractor must provide a thirty (30) day no-questions-asked return option, from the date of delivery to end-user.
- 1l. Successful contractor(s) shall be responsible for replacing at no cost to Eligible Organization any damaged or inoperable-on-receipt products received under this contract within 30 days from notification by that Eligible Organization. This includes all shipping costs for returning non-functional items to the contractor for replacement.
- 1m. Any price reductions from manufacturer from the time of submission of a purchase order to product delivery must be passed on to the Eligible Organization that issued the purchase order.
- 1n. Successful contractor(s) shall retain and maintain all records and documents relating to this Contract for six (6) years after final payment by the Eligible Organization hereunder or any applicable statute of limitations, whichever is longer, and shall make them available for inspection and audit by authorized representatives of the Eligible Organization, including the procurement officer or designee, at all reasonable times.
- 1o. Successful contractor(s) must provide corporate executive level sponsorship to establish and maintain fundamental familiarity/understanding with MHEC and the Compact's Eligible Organizations.
- 1p. At a minimum, Respondents must offer services in all twelve (12) MHEC member states. For service to be considered offered in a state it must be offered in the whole state.
- 1q. Contractor must indicate country of manufacture and country of assembly.
- 1r. Increasingly, Eligible Organizations are committed to promote environmentally sound procurement, usage and disposal methods which are in compliance with State, County, and Municipal regulations. Many Eligible Organizations have a recycling program for starch and Styrofoam packing peanuts. Our preference is to receive starch peanuts whenever possible. The Contractor shall not use INSTAPAK™ or mix starch and Styrofoam peanuts under any circumstances. Each product shall be separately pre-packed in accordance with commercially accepted methods. Small products may be packaged in protective envelopes (Mail-Lite or Bubble-Jet packs).
- 1s. MHEC reserves the right, but is not obligated, to request that each respondent provide a formal presentation of its proposal at a date, time and place to be determined. If required by the MHEC Data Management Subcommittee, it is anticipated that such presentation will not exceed two (2) hours. No respondent will be entitled to be present during, or otherwise receive any information regarding, any other presentation of any other respondent.
- 1t. MHEC reserves the right to require a Financial Capacity report consisting of the following:
 - i. Sources of financing (shareholders, venture capital, etc.)
 - ii. Bank references and name of auditing firm

- iii. Last two annual reports and all quarterly reports since the last annual report
- iv. Identification of the Parent Corporation and any subsidiaries
- v. List of all current higher education customers in the MHEC region, and all customers for whom similar work was performed during the past 2 years.

2. Administrative Fee

MHEC had incurred, and will continue to incur, costs and expenses in the development, implementation, administration, and marketing of this program. All responses shall include an administration fee component based on sales of all products and services proposed. The contractor shall pay MHEC for: 1) total accumulative sales greater than one billion, an administration fee of 0.10% or 0.0010; 2) total accumulative sales between one hundred million and one billion, an administration fee of 0.25% or 0.0025; 3) total accumulative sales between one million and one hundred million, an administration fee of 0.50% or 0.005; and 4) total accumulative sales less than one million, an administration fee of 1.50% or 0.015.

Administration Fee	Sales (US Dollars)
0.10%	> \$1 Billion
0.25%	\$100 Million - \$1 Billion
0.50%	\$1 - \$100 Million
1.50%	< \$1 Million

The contractor will be responsible for submitting the administration fee with the Quarterly Report. The Administrative Fee will be adjusted quarterly, based on the total accumulative sales for the duration of the Master Price Agreement.

3. Quarterly Report

Contractor must submit business activity reports each quarter. The quarterly reports must include, at the minimum, the following information:

- Year
- Quarter Number
- MHEC Contract Number
- Vendor Name
- Vendor Contact (Name, phone number and email address of person who may be contacted for questions about the report)
- Customer Name
- Customer Type (Higher Education, K-12, state agencies, cities, counties, local subdivisions)
- Vendor Customer Number
- Federal Employer Identification Number (FEIN)
- IPEDS ID (Integrated Postsecondary Education Data Systems)*
- NCES District ID (National Center for Education Statistic)*
- NCES School ID (National Center for Education Statistic)*
- Address (Billing)
- City

- State
- Zip Code
- Purchase Order Number
- Product Description
- Date Shipped or Delivered to End User
- Quantity
- List Price
- Sale Price
- Administration Fee
- % Discount
- \$ Savings
- Reseller (if applicable)

*Preferred data fields for Higher Education (IPEDS) and K-12 (NCES) Eligible Participants

Quarterly Reports and Administrative Fees are shall be submitted by end of the preceding month after the end of March, June, September, and December of each calendar year.

Calendar Quarter 1 (Jan 1 Mar 31)	Due April 30
Calendar Quarter 2 (April 1 to June 30)	Due July 31
Calendar Quarter 3 (July 1 to September 30)	Due October 31
Calendar Quarter 4 (October 1 to December 31)	Due January 31

4. Business Reviews

Performance of the successful contractor(s) will be closely monitored by an oversight committee on any resulting contract. Individual institutions have the ability to control their own ordering process under the contract’s Master Price Agreement. If deliveries prove to be unsatisfactory, or other problems arise, MHEC reserves the right to delete product or services from the Master Price Agreement and/or cancel Master Price Agreement for cause, and may award to the next acceptable respondent, or cancel and request new proposals. Similarly, if deliveries prove to be unsatisfactory or other problems arise under the agreement for an Eligible Participant, the Eligible Organization retains all of its remedies for a default. Failure of MHEC or the Eligible Organization to exercise their rights of termination for cause or other remedies for default due to a respondent's failure to perform as required in any instance shall not constitute a waiver of termination rights or other default remedies in any other instance.

5. Marketing

MHEC Eligible Organizations range in size and complexity from large public multi-campus state university systems with significant research programs and highly complex I.T. infrastructures to small private colleges and local community colleges. Please explain your proposed marketing plan for bringing your products and services to the attention of Eligible Participants which should include a strategy for:

- 5a. Offering a wide enough variety of products and services at price points within the range of these institutions so that your products and services would be of value to eligible institutions;
- 5b. Disseminating a cooperative announcement (press) of a signed contract;
- 5c. Educating internal staff and sales force about MHEC;

- 5d. Establishing a MHEC-specific website, to be linked from <http://MHECtech.org> to the successful respondent's website;
- 5e. Participating in MHEC-branded webinars intended to educate MHEC constituency with informative briefings, technical overviews, and training;
- 5f. Sponsoring activity in the MHEC Technologies Committee annual meeting and/or other MHEC sponsored events (e.g. annual Commission Meeting & Policy Summit); and
- 5g. Sharing successes that MHEC could cooperatively communicate through its monthly news or other means (e.g. technology newsletter, website, social media, etc.).
- 5h. Mutual review and evaluation of the marketing plan(s) will be done, at a minimum, during annual executive briefings. MHEC requests respondent and any applicable resellers to outline their strategy for:
 - i. Establishing a marketing point of contact(s) for MHEC, indicating if there are different contacts for media (news releases) vs. multi-media (webinars, website updates, etc.);
 - ii. Working with MHEC's director of communications and marketing for all communications approvals such as, but not limited to, news releases, use of MHEC logo; and
 - iii. Participating in an annual webinar with the Compact staff to educate sales staff about the Midwestern Higher Education Compact and understanding the contract

H. Data (document) Management Needs Requirements

Proposer's solutions will be evaluated based on the degree to which they address the needs of Higher Education institutions for Data (document) Management Needs solutions. Therefore, it is critical that the Proposer include sufficient information for a detailed assessment of the ability of the proposed solution to meet the needs of higher education institutions.

Proposer should NOT submit sales or marketing materials. Proposer should submit a thoughtful, well-developed approach with detail specific to the higher education needs. The proposal should include a brief introductory overview, but should then address:

- Functional capabilities
- Technical capabilities and requirements
- Service and maintenance
- Security measures
- End user experience
- Training
- Retention of value over time
- Ability to keep product current with changing environments (addressing not only the immediate problem but also how the solution will allow higher education institutions to plan for and manage growth throughout the life-cycle of the solution.)

Proposers are not limited to the list above and should include any relevant information. Proposals that do not include sufficient information or that consist solely of marketing materials may be removed from consideration with no further discussion.

While MHEC recognizes that utilization of proprietary methods or protocols sometimes provides competitive advantage, MHEC will give preference to those Proposers whose

products support open source or also support recognized industry standard methods and protocols.

To complete this section, the Solution Objectives Table may be recreated and/or enlarged to fit your responses. Proposers must provide a response to each point. Each response should be detailed enough to allow our evaluators to thoroughly evaluate your proposal. Recreated tables must contain all requirements in the same order as the original.

Solution Objectives Table

No.	Solution Objectives	Response
1.	Provide a high-level overview of the proposed solution(s).	
2.	Degree to which each HEITS is accessible: mobile, online education, cloud, and BYOD environments	
3.	Degree to which each HEITS is platform agnostic	
4.	Degree to which each HEITS balances agility, openness, and security	
5.	Degree to which each HEITS is personalizable:	
6.	Degree to which each HEITS is flexible: can an enterprise IT architecture respond to changing conditions and new opportunities	
7.	Degree to which each HEITS increases the IT organization's capacity for managing change, despite differing community needs, priorities, and abilities	
8.	Degree to which each HEITS is responsive to the described issue.	
9.	How the HEITS will work for new and legacy users of the solution or critical components thereof. This should include any migration from older solutions.	
10.	Degree to which the solution is scalable	
11.	Degree to which the funding/procurement model sustains core service, supports innovation, and facilitates growth	
12.	Degree to which the solution delivers VALUE to institutions of all types (small/large, public/private)	
13.	Method of performance of contract	
14.	Degree to which the respondent provides detailed training options to support their proposed solution, and their capability to provide technical support training.	
15.	Understanding and support of niche markets in higher education.	
16.	Creativity and applicability of licensing	

	models, if appropriate	
17.	Other:	

I. Warranty

As this is a request for solutions, the successful contractor(s) shall warrant that the product is suited to the usage indicated.

J. Pricing

1. Technological advances are anticipated over the term of this contract. Vendors should include pricing in at least one of the following formats:

- Discount percentage from best published higher education price list
- Discount percentage from original purchase price (for support only)
- Higher Education Licensing methodology and schedule

Respondents may also propose alternate pricing arrangements in addition to those above. MHEC may choose to accept or reject such alternative arrangements. In addition to purchase prices, the Respondent may offer a direct or indirect leasing program.

2. Proposals will be evaluated on the cost-effectiveness of the solution, but it is recognized that the nature of a HEITS response may make it impossible to provide a single price. Instead, each respondent will be asked to provide sample solution quotations for a relatively straight-forward implementation based on market basket scenarios provided in the following section. In addition to providing said sample quotation, respondents will also need to describe the pricing model that was used to determine the price and how that model will apply to other possible elements of the solution. If a different pricing model is applied to the other elements of the solution that is not as favorable, MHEC reserves the right to assess pricing components based on whichever pricing model is least advantageous to the institutions.

3. Market Basket Scenarios

Scenario #	Scenario Description
1	<p>Institution A is a small institution (3000 students, 500 staff, public 4yr, single campus with extension sites) looking for a way to easily develop and share e-forms in Human Resources processes. While not particularly well-versed in what options they might be able to implement, Institution A has identified some challenging areas where improvements need to be made:</p> <ul style="list-style-type: none"> • Open jobs are listed on a very archaic site that is difficult for applicants to navigate. • Forms are typically posted as pdf files, with the applicant returning them via a mix of email, hand delivery and postal service. Many are hand-written. • Applications are often missing information, but this may not be discovered or addressed for several weeks. • Applicants must contact the institution if they want to confirm an application was received. • Applications are distributing to hiring managers and

	<p>committees via paper copies.</p> <ul style="list-style-type: none"> • Documentation from the hiring department is also done on paper pdf forms. These forms have to have multiple approvals from various campus departments, and significant staff time is spent keeping track of where the form is and who has or has not approved it. • Approval to hire is done via e-mail. Those being hired sometimes find out they have been hired before their new boss knows they've been approved! • Notifications to applicants are inconsistent, with each hiring manager doing as they see fit in this area. No reporting or tracking is done. • Errors are made when the hiring information is manually entered into the Institution's ERP system. <p>Institution A's budget is limited for this activity, and they must show the benefit for each dollar spent. They do NOT have ROI data to compile for a true return on investment analysis. Institution A does NOT have internal IT staff and programmers, so they are very concerned about being able to maintain any solution purchased.</p> <p>Please describe your proposed solution for Institution A, including all costs for the anticipated life-cycle of same.</p>
2	<p>Institution B is one of 16 public technical colleges that is overseen by a State Technical College System (STCS). STCS operates under a shared governance model, with responsibility for operations and oversight shared by the STCS Board (System Board) and 16 local District Boards. STCS is the administrative and coordinating agency of the STCS Board. It helps ensure quality, accountability and efficiency.</p> <p>Institution B Technical College is a customer-focused, accessible provider of innovative lifelong learning that builds a globally competitive workforce. The College has six convenient campus locations through-out their state, as well as four Centers of Excellence. Institution B serves a 5,900 square mile, 10-county district. With more than 180 associate degree, technical diploma, or short-term certificate programs, Institution B is committed to being its community's college. Institution B consists of 30,000 students, 1,000 employees, 6 physical campuses ranging in size from 100 to 3,000 student full time equivalents (FTEs), 1 virtual campus located entirely in cyberspace, a \$100 million annual budget, 1 centralized data center and IT team, and 1 centralized IT team.</p> <p>Institution B has identified the need for improvement in the following area (also applicable to the other 15 STCS institutions).</p> <ul style="list-style-type: none"> • Student record check lists. <ul style="list-style-type: none"> ○ Creating an electronic document out of a paper document is a daily occurrence. ○ Work is currently being completed to convert all existing student records into an electronic format. ○ Students continue to submit paper documents that then

	<p>have to be converted.</p> <ul style="list-style-type: none"> ○ Student records need to be shared in a timely manner to all locations and sometimes with other WTCS institutions or other partners. ○ With more than 180 associate degree programs there are several different program requirements and/or check lists that a student must traverse during the application process. This typically requires the submission of multiple documents. ○ Check lists are created in our Student Information System (SIS) that are then manually updated as paper and electronic documents are gathered. The intent is to give students a place to check to see what documents they still need to submit. ○ The manual process of updating the check list can cause a back log. ○ If the check list is not updated the student may submit the same document multiple times. ○ Students may not realize they are missing documents <p>Please describe your proposed solution for Institution B, including all costs for the anticipated life-cycle of same.</p>
3	<p>Institution C is a small private college located in the heart of the Midwest. Almost exclusively residential, the college does have a nexus located in one city, and a budding online program that is produced in conjunction with an education firm in a major metropolitan city. Institution C consists of 600 FTE on campus students, 40 virtual and nexus campus students, 200 employees, 1 datacenter, 1 IT department and 1 ERP specialist. The full institutional budget is not available, but the overall IT budget is about \$100,000.</p> <p>Institution C's document needs are developing. They have had issues with business processes and are currently under probation from HLC for failure to get them organized and properly stabilized. The Business office is currently becoming more paper centric in order to establish a work flow. After establishing work flow, they wish to automate as much of the business process as possible within the ERP software, currently hosted and provided by Jenzabar. Business documents are likely consist of:</p> <ul style="list-style-type: none"> ● Invoices ● Signed documents ● Student signatures ● Admin approval signatures ● Receipts for reimbursements ● Contracts <p>Please describe your proposed solution for Institution C, including all costs for the anticipated life-cycle of same.</p>

4	<p>Institution D is a large, public land-grant University that is approximately a \$2.1 billion enterprise with more than 13,000 full time employees. Institution D offers more than 300 degree programs through 18 colleges and schools including law, medicine, veterinary medicine and a nuclear research reactor, and offers extension programs across the state. Institution D has ~30,000 students.</p> <p>Institution D has identified consistent needs in the following areas:</p> <ul style="list-style-type: none"> • Support the digitization and cataloging of existing paper documents to meet document retention requirements. • Support the auto-archive/expiration of documents within the system based on retention requirements. • Support the ingestion of electronically transferred documents (i.e., transcripts or immunization records). • Support integration with email systems for archiving of documents received via email. • Support workflow around documents to capture signatures and approvals. • Support integration of document capture into existing online processes, such as admissions and financial aid online forms. • Support integration of captured documents into ERP systems for financials and/or student information. • Support the digitization of paper forms to allow for capture and store document within solution. • Support full-text indexing for searches across all documents in system. • Support full-text indexing for searches within a specific archive and/or workflow. • Support integration with a variety of input devices, to include scanners, iMFPS, and mobile devices. • Support GUI-based design for document workflows. • Support within the GUI to show where a document is at within a given workflow. • Support for a document to exist within multiple workflows simultaneously. • Support for redaction of restricted and/or regulated information within documents (i.e., social security numbers). • Support migration from existing document management systems and/or documents stored on file servers. • Support for sharing of documents externally with other organizations. <p>Please describe a proposed solution for Institution D, including all costs for the anticipated life-cycle of same.</p>
5	<p>Institution E is a State Level System - defined as a group of distinct degree-granting public higher education institutions under a single administrative authority, each institution with its own identity and each with one or more physical and/or virtual campuses. In general, each</p>

	<p>institution is responsible for its own data and its own records. However because of the higher level administrative authority, there are some data and some documents which need to be shared between and among institutions. For this scenario, assume a state-level system that consisting of 182,000 students, 40,000 employees, 26 physical campuses ranging in size from 600 students to 38,000 students, 1 virtual campus located entirely in cyberspace, 1 administrative unit, 1 non-degree granting continuing education unit with continuing education programs and personnel in each of 70 counties statewide, and 1 shared data center, and associated I.T. service center capable of providing “private cloud” services to all campuses and administrative units. Institution E has a \$6 billion annual budget.</p> <p>Institution E knows that solutions that will work for a single institution, campus, or department often do not scale well to a state-level system. Therefore, Institution E is looking for solutions that will alleviate these challenges:</p> <ul style="list-style-type: none"> • The ad hoc mixture of electronic and paper documents of every kind that currently exists at every level of the organization. <ul style="list-style-type: none"> ○ Creating an electronic document out of a paper document and vice versa are both common occurrences ○ It would be far too time consuming and far too costly either to convert all electronic documents into paper documents and store them securely, OR to convert all existing paper documents into electronic documents and store them securely ○ Because of the mixture and ease of proliferation of both electronic and paper documents, it is often difficult or impossible to determine which copy of a document is the authoritative version of any given record. ○ It is also difficult or impossible to determine whether each institution individually, and the system as a whole, is in or out of regulatory compliance regarding record keeping, record retention, and secure destruction of expired documents. ○ Many “shadow” record-keeping systems are known to exist, and the primary reasons for this proliferation of “shadow” systems appear to be: <ul style="list-style-type: none"> ▪ The ease with which an electronic document can be printed or duplicated electronically and stored in multiple locations by multiple people ▪ The ease with which any given paper document can be scanned or copied and stored, often in multiple locations and formats by multiple people ▪ The difficulty and expense of getting institutions, divisions, departments and individuals to alter document handling processes with which they are already comfortable ○ Too little automated processing of documents creates
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	<p>too many “touch” points by too many people, each of which introduces risk to the confidentiality, availability, authenticity, and integrity of the document</p> <ul style="list-style-type: none"> ▪ Lack of automated processing of documents also leads to routine, repetitive, and labor-intensive hand-processing of many documents ▪ Lack of automated work flow requires repeated sequential handling of a single document ▪ Regulatory requirements are the source of many document needs, and those regulatory requirements are usually beyond the influence of the institution <p>Please describe your proposed solution for Institution E, including all costs for the anticipated life-cycle of same.</p>
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4. Some additional factors, which might modify pricing in the specific instances noted below, are:
 - Eligible Organization’s, who are willing to provide local warranty, repair, or sales services present lower costs to the vendor and should be rewarded.
 - Differential pricing based on market segment (e.g. higher education, K-12, local governments, state governments, faculty, staff or students) may be proposed.
5. Submission of innovative program ideas to increase vendor penetration of the market or increase satisfaction of the Eligible Organizations, as well as provide opportunity for stronger relationships, is encouraged.
6. Respondents are encouraged to provide a contract mechanism for their current eligible customers to roll into this agreement at any time after the inception of the contract.
7. Successful Respondent agrees not to sell awarded products or services or bundles to Eligible Organizations at a price higher than that awarded via the MHEC Master Price Agreement.
8. All pricing on future products and services offered under this proposal must, at a minimum, reflect the same percentage discounts or better as established with this contract award. Greater discounts are permissible and encouraged.
9. Any price reductions from suppliers from the time of proposal submission to time of purchase order must be passed on to the Eligible Organizations.
10. Respondents must identify and all associated costs, fees or charges for which the Eligible Organizations may be billed.

K. Price/Fee Increases

MHEC reserves the right to accept or reject all or any part of successful contractor’s subsequent request to increase pricing. The pricing set forth in the Respondents proposal shall not increase during the initial twelve (12) months of the Master Agreement. At a minimum, any proposed price increase will become effective only upon thirty (30) days prior written notice and written acceptance by MHEC. In addition to the provision of an e-commerce web site for this contract, successful respondents will be expected to provide complete updated price lists to MHEC on a quarterly or annual basis. All line item price

increases or decreases and product additions or deletions must be identified. Vendor must provide an identified capped annual increase rate for the life of the contract.

L. Certification of Independent Price Determination

By submitting a proposal, the vendor certifies, and in the case of a joint proposal, to its own firm, that in connection with this proposal:

1. The proposal has been arrived at independently, without consultation, communication or agreement with any competitor for the purpose of restricting competition, and;
2. Unless otherwise required by law, the offer cited in this proposal has not been and will not be knowingly disclosed by the vendor prior to opening directly or indirectly to any other vendor; and
3. No attempt has been made nor will be made by the vendor to induce another person or firm to submit or not to submit a proposal for the purpose of restricting competition.

M. Signatory Authority

Each person signing this proposal certifies that:

1. The signer is the person in the vendor’s firm responsible for the decision to offer the proposal; or
2. The signer is not the person in the vendor’s firm responsible within that firm for the decision to offer, but has been authorized in writing to act as agent to quote for the persons responsible for such decisions.

N. Illegal Conduct

All responses must include a statement as to whether or not the responding firm has been convicted of bribery or attempting to bribe a public official, barred from contracting with a unit of local, state or federal government as a result of bid rigging, or for any other reason or been convicted of a felony.

O. Conflict of Interest

In submitting a response to the RFP, the Provider certifies that no relationship exists between the Provider and the Midwestern Higher Education Compact or the members of its Data Management subcommittee that interferes with fair competition or is a conflict of interest, and that no relationship exists between the Provider, and other persons or firms that constitutes a conflict of interest that is adverse to the Midwestern Higher Education Compact.

P. RFP Schedule of Events

The following schedule lists meetings and deadlines related to this Request For Proposal (RFP) on the development of a Master Price Agreement(s) for the MHEC Data (document) Management Needs. Deadline dates are as indicated unless otherwise changed by the Committee. In the event that the Committee finds it necessary to change any of the dates or activities listed in this calendar, it will do so by issuing a written statement or an amendment to the RFP to prospective Providers.

Event	Date
1. Formal issuance of RFP	March 1, 2016

2. Last day for submitting inquiries about RFP by e-mail	March 10, 2016
3. e-mail delivery to Prospective Providers of answers and amendment(s) to the RFP	March 16, 2016
4. Proposals due from Prospective Providers	March 31, 2016
5. Notification of Finalists	April 14, 2016
6. Individual meetings with Finalists (Chicago O'Hare) to review proposals submitted by each Prospective Provider Finalist (if required)	April 27, 2016 Or April 28, 2016
7. Deadline for submitting responses to Committee's questions and inquiries	May 13, 2016
8. Selection and announcement of Solution and Provider(s)	June 2016
9. Execution of Agreement and Solution start date	July 2016

Q. Pre-proposal Conference and Requests for Clarification

Because of the straight-forward nature of this RFP, we will only use a one-stage process to answer questions. The question & answer stage will be conducted by e-mail, rather than through a bidders' meeting:

- Questions are to be submitted by e-mail to nathans@mhec.org no later than Thursday, March 10, 2016.
- Our answers will be provided to all Respondents who submitted question via email and will posted on-line at <http://www.mhec.org/rfps> on Wednesday, March 16, 2016.

Information about the Compact, its member states, the Information Technologies Committee, the Data Management Subcommittee and this RFP may be discussed. Requests for clarification, revisions to requirements or technical questions concerning the RFP may be submitted. Participation in the pre-proposal activities is voluntary.

If a prospective proposer discovers a significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in the RFP, the provider should *immediately* notify Mr. Nathan Jay Sorensen of such error and request modification or clarification of the RFP document. Only information supplied by MHEC in writing through Mr. Nathan Jay Sorensen or this RFP or amended RFP should be used as a basis for the preparation of provider responses.

R. Submission Deadlines and Format

The deadline for submission of proposals and related information is 10:00 a.m. Central Daylight Savings Time on Thursday, March 31, 2016. One (1) sealed bound original and one (1) identical electronic copy (acceptable media CD, DVD, flash drive) of the response OR an electronic copy to nathans@mhec.org under 15MB in size should be forwarded to the following address prior to the deadline: Allowable formats are PDF and Microsoft Office. Spreadsheet data such as price lists may be submitted in MS Excel format. Proposals should be organized and presented in a manner that addresses all of the RFP provisions and requirements.

Data Management Subcommittee
c/o Mr. Nathan Jay Sorensen
Midwestern Higher Education Compact
105 Fifth Avenue South, Suite 450,

S. Selection of Finalists and Best and Final Offers from Finalists

The Committee will select and notify the finalists on April 14, 2016. Only finalists will be invited to participate in the subsequent steps of the procurement. Prospective Provider Finalists may be asked to make a presentation to the Committee in Chicago, IL during the period of April 27 or 28, 2016. Prospective Provider Finalists may be asked to submit revisions to their proposals for the purpose of obtaining best and final offers by Friday, May 13, 2016.

The Committee reserves the right to recommend award at any point after the initial evaluation.

T. Provider(s) Selection

All proposals received on or before the deadline date of submission will be forwarded to each evaluator. The evaluators will conduct evaluations of responses based upon its assessment of the quality and comprehensiveness of the prospective proposer's responses to the criteria set forth in the RFP. During this initial evaluation time, the Subcommittee may, at its option, initiate discussions with prospective providers who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals, but proposals may be accepted and evaluated without such discussion. The prospective providers shall not initiate discussion. The Subcommittee reserves the right to waive or modify any informalities, irregularities or inconsistencies in the responses received.

Award(s) may be granted to the highest scoring responsive and responsible proposer(s). Alternatively, the highest scoring proposer or proposers may be requested to submit best and final offers. Upon completion of the evaluation process, the Subcommittee will recommend one or more prospective providers to the Compact, and the Compact will enter discussions to establish an agreement with the recommended provider(s). Once an agreement(s) is successfully consummated, the Compact will so notify all providers who responded to the RFP. The Subcommittee reserves the right to not recommend any prospective providers to the Compact, and the Compact reserves the right not to enter into an agreement with a recommended provider at its own discretion.

After the Master Price Agreement(s) are executed, all proposals and documents pertaining to the proposals will be open to the public. If the prospective provider submits information in response to this RFP that it believes to be trade secret materials as defined by the laws of the MHEC member states, the prospective provider must:

- a. clearly mark all trade secret materials in its response at the time the response is submitted;
- b. include a statement with its response justifying with specificity the trade secret designation for each item, and;
- c. defend any action seeking release of the materials it believes to be a trade secret, and indemnify and hold harmless MHEC, its Commissioners, agents and employees, from any judgments awarded against MHEC in favor of the party requesting the materials, and any and all costs connected with the defense. This indemnification survives MHEC's award of a contract. In submitting a response to this RFP, the prospective provider agrees that this indemnification survives as long as the trade secret materials are in possession of MHEC.

In the event a request is made for information which the prospective provider has identified as trade secret, MHEC agrees to notify prospective provider of said request and provide its determination as to whether disclosure is legally required, in addition to anticipated disclosure dates, if any, and to allow the prospective provider an opportunity, in its discretion and at its sole expense, to seek a protective order or otherwise protect the confidentiality of the information.

U. Contract Term

The MHEC Master Price Agreement shall be effective on the date that the parties to the Agreement sign the Agreement. It shall remain in effect for three (3) years from that date with options by mutual agreement (of the parties to the Agreement) to renew for up to four (4) additional one (1) year periods. Eligible Organizations may procure hardware, software, or services from the provider under the terms of the MHEC Master Price Agreement at any time during the duration of the Agreement.

V. Incurring Costs

MHEC is not liable for any cost incurred by prospective providers in replying to this RFP.

W. Method of Operation

The Subcommittee, at the direction of the Commission and its Compact authority, will negotiate the pricing structures, terms and conditions and related services provided under the Master Price Agreement(s). Any terms and conditions which may be the subject of negotiation, will be discussed only between MHEC and the selected provider(s) and shall not be deemed an opportunity to amend the provider's proposal. MHEC reserves the right to terminate negotiations and select the next response providing the best value for MHEC, prepare and release a new RFP, or take such other actions as MHEC deems appropriate if negotiations fail to result in a successful contract. Once a Master Price Agreement(s) is formally established, Eligible Organizations will be responsible for procurement and payment of charges associated with the hardware, software, and related services provided to them. MHEC will not be liable for the failure of any Eligible Organization to make payment or for the breach of any term or condition under the Master Price Agreement.

The Compact will appoint a Committee composed of representatives of the Data Management Subcommittee to oversee the solution and assure that it operates in an effective and efficient manner. The Compact will also assist in promoting the solution and assist Eligible Organizations with problems as requested. The Committee will periodically review and evaluate the performance of the solution and submit its recommendations to the Compact. The Compact will provide staff support to the solution, and will support information exchanges, conferences and related activities.

In advance of each contract anniversary representatives from each successful respondent will meet with representatives from the Data Management Subcommittee to discuss contract performance over the past year and amend the contract to improve its performance for the respondent and Eligible Organizations. These annual business reviews are crucial success factor.

The Compact, the members of the Technologies Committee and the members of the Data Management Subcommittee make no guarantee that any Eligible Organization or number of Eligible Organizations will participate in the MHEC Higher Education Information Technology Solutions (HEITS) Data (document) Management Needs and/or make any purchase under the Master Price Agreement.

X. Contacting MHEC

For further information about the Midwestern Higher Education Compact and its solutions you are referred to the Compact website at: <http://www.mhec.org>

For Further information about the Compact's Technologies Committee or the Data Management subcommittee, visit <http://www.mhectechnology.org> or contact:

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