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**University of Southern Indiana**

**Information Technology Asset Management and**

**System Imaging Software**

**REQUEST FOR PROPOSAL**

**Bid Number 24-12-18039-03170**

**Issue Date: 3-4-2024**

**Questions Due-Jeff Sponn (jsponn@usi.edu): 3-18-2024 11:00 AM CST**

**Answers Provided via Addendum by 3-21-2024**

**DUE DATE: 4-2-2024 2:00 PM CST**

**SECTION I: COMPANY INFORMATION, EXPERIENCE, IMPLEMENTATION, AND REFERENCES**

1. Introduction:

The University of Southern Indiana (USI) is seeking proposals from qualified vendors for Information Technology Asset Management (ITAM) and System Imaging Software solutions. We are interested in acquiring a comprehensive software solution that will streamline our IT asset management processes, improve efficiency, enhance security, and optimize resource allocation within our organization.

1. Background:

IT Asset Management (ITAM) practices are essential for our teams to keep manage university owned hardware and software. Accurate tracking and managing of assets helps us make informed decisions, stay compliant with regulations, and reduce security risks. While efficient software imaging makes system deployment easier by simplifying the setup and management of software across different devices.

1. Scope of Work:

The selected vendor will be responsible for providing Information an ITAM and System Imaging Software solutions. The scope of work includes, but is not limited to, the following:

1. Conduct a comprehensive assessment of our IT asset, software imaging, software distribution, and software license management. Propose a tailored solution to streamline processes and improve efficiency.
2. Identifying all servers and workstations within our infrastructure and recording details such as make, model, serial number, specifications, and location.
3. Help to develop software-based procedures for procurement, deployment, maintenance, and retirement of servers and workstations. As well as for software imaging and deployment.
4. Oversee the installation, configuration, and integration of the selected ITAM and software imaging solutions with our existing infrastructure. Ensure smooth deployment and functionality.
5. Provide training sessions for IT administrators and end-users on software usage. Supply comprehensive documentation and user guides for reference.
6. Offer continuous support and maintenance services post-implementation to address technical issues, updates, and troubleshooting needs promptly.
7. Integration with our service desk ticketing system (TeamDynamix).
8. Please provide company information:

|  |  |  |
| --- | --- | --- |
| A | Legal name of company |  |
| B | Operating name of company |  |
| C | Headquarters’ street address, city, state, zip code |  |
| D | Mailing address, city, state, zip code (if different from headquarters’ address) |  |
| E | Name of primary sales representative |  |
| F | Email of primary sale representative |  |
| G | Phone number of primary sales representative |  |
| H | Name of secondary sale representative |  |
| I | Email of secondary sales representative |  |
| J | Phone number of secondary sales representative |  |
| K | Year company was established |  |
| L | Number of offices |  |
| M | Total number of employees |  |
| N | Total number of full-time customer service and/or technical support representatives |  |
| O | Total number of full-time training representatives |  |
| P | Average tenure of employees with company |  |

1. Has the company been involved in a merger or been acquired by another business entity in the past? If yes, please provide details including the year, name of business(es) involved, and how customer relationships were maintained throughout the transition.
2. Is the company currently for sale or involved in any transaction to expand through acquisition or merger, or to be acquired by another business entity? If yes, provide a statement explaining the impact both in organizational and directional terms.
3. Does any relationship exist, whether by relative, business associate, capital funding agreement or any other such kinship, between the company and any employee of University of Southern Indiana (USI)? If yes, provide a statement of disclosure. All such disclosures will be subject to administrative review and approval prior to entering into any contract with USI.
4. Does the company agree that the submitted proposal contains accurate information, constitutes an offer to USI, and shall be valid for a period of 120 calendar days after the date of submission?
5. Please provide brief history of company (in 250 words or less).
6. Please provide primary strengths that differentiates the company from competition (in 250 words or less).
7. Please provide number of total customers using your solution.
8. Please provide a listing of your current higher education customers.
9. How would your largest customer rate their satisfaction with your system and your support versus your smallest customer?
10. Please describe the process for onboarding a new client, including average length of time for completion.
11. Please describe the company’s recent experience with onboarding for a similarly sized (or larger) higher education institution.
12. Does the company have the time and the resources to onboard a new client within 90-120 days of the contract award?
13. Please provide details of Information Security framework standards. Are they verified by a certified external party (SOC 2 Type II, Penetration Testing, ISO Certified)? Outline any applicable regulatory compliance requirements your organization compiles with (HIPAA, GLBA, PCI, GDPR, FERPA). Has there been any identified or reported information security breach in the last 5 years?
14. Please provide a list of at least three organizational references, preferably other higher education institutions with programs of similar size and scope to USI.

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| --- | --- | --- |
| **A** | **Organization’s Name** |  |
|  | Headquarters’ street address, city, state, zip code |  |
|  | Mailing address, city, state, zip code (if different from physical address) |  |
|  | Name of primary contact |  |
|  | Email of primary contact |  |
|  | Phone number of primary contact |  |
|  | Customer since (date) |  |
|  | Approximate number of programs per year |  |
|  | Approximate number of participants served per year |  |

|  |  |  |
| --- | --- | --- |
| **B** | **Organization’s Name** |  |
|  | Headquarters’ street address, city, state, zip code |  |
|  | Mailing address, city, state, zip code (if different from physical address) |  |
|  | Name of primary contact |  |
|  | Email of primary contact |  |
|  | Phone number of primary contact |  |
|  | Customer since (date) |  |
|  | Approximate number of programs per year |  |
|  | Approximate number of participants served per year |  |

|  |  |  |
| --- | --- | --- |
| **C** | **Organization’s Name** |  |
|  | Headquarters’ street address, city, state, zip code |  |
|  | Mailing address, city, state, zip code (if different from physical address) |  |
|  | Name of primary contact |  |
|  | Email of primary contact |  |
|  | Phone number of primary contact |  |
|  | Customer since (date) |  |
|  | Approximate number of programs per year |  |
|  | Approximate number of participants served per year |  |

**SECTION II: Software Features and Tech Support**

1. Product Features and Capabilities:

* What are the key features and functionalities of your ITAM solution?
* How does your product handle inventory tracking, software license management, and hardware lifecycle management?
* How does your product handle software imaging?

1. Integration and Compatibility:

* Can your ITAM solution integrate with existing IT systems and tools (e.g., ITSM platforms, CMDBs, TeamDynamix)?
* How easily can your product adapt to our organization's infrastructure and technologies?

1. Scalability and Flexibility:

* How scalable is your ITAM solution, and what is the maximum capacity it can handle?
* Does your product offer customization options to accommodate unique organizational needs?

1. Security and Compliance:

* What security measures are in place to protect sensitive asset data?
* How does your ITAM solution ensure compliance with industry regulations and standards (e.g., GDPR, HIPAA, FERPA)?

1. Reporting and Analytics:

* What reporting capabilities does your product offer?
* Can your ITAM solution provide insights and analytics to optimize asset utilization and cost management?

1. Support and Training:

* What levels of support do you offer, and what are the response times for support requests?
* Do you provide training and resources to help users effectively utilize your ITAM solution?

1. Product Roadmap and Future Developments:

* What new features or enhancements are planned for future releases of your ITAM solution?
* How do you gather feedback from customers to drive product improvements?

1. Implementation Process:

* What does the implementation process typically entail, and how long does it take to deploy your ITAM solution?
* Do you provide professional services or assistance to ensure a smooth implementation?

**SECTION III: PRICING/FEE SCHEDULE**

1. Please indicate how fees are determined. Indicate if this is an annual fee, a fee per ticket, a per transaction fee.
2. Please indicate add-on service(s) and their fees to allow for additional review of optional offerings (if applicable).
3. Please indicate upgrade fees (if applicable).
4. Please indicate training fee schedule (if applicable).
5. Please indicate reporting/administrative applications fees (if applicable).
6. Please indicate any other fees associated with your service that are not stated here.
7. How often, on average over the past 5 years, has your pricing schedule changed? What was the average percentage increase/decrease?