



MARQUETTE
UNIVERSITY

Be The Difference.

Request for Proposal:

Marquette University
INSERT DEPARTMENT
INSERT NAME(S) OF RECIPIENT(S)
INSERT ADDRESS
Milwaukee, WI 53233

Date of Inquiry: INSERT DATE OF RFP BEING SENT
Return Proposal by: INSERT DATE RFP RETURN IS DUE
Delivery Requirements: As described below
Terms: Net 30 or INSERT PAYMENT TERMS

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Objectives of the Proposal

To provide and promote a preferred sole- or dual-source supplier relationship to the Marquette University (“MU”, “Marquette” or “University”) community for RFP TOPIC. “RFP TOPIC” are to be defined in this RFP as

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DETAILS OF RFP TOPIC. Please note, the term “preferred supplier” does not mean sole or exclusive supplier. In the past, we have regularly conducted business with preferred suppliers approximately 80% of the time.

INSERT ADDITIONAL INFORMATION ABOUT THE GROUP TO BE SERVED BY THIS RFP (E.G. FACILITIES SERVICES, STUDENTS, ETC).

Marquette will measure the best supplier based on LIST KEY CRITERIA TO THE SELECTION PROCESS.

Additional criteria that may be used to determine which supplier is best suited to meet Marquette University’s needs may include reference checks, corporate visits and user site visits.

MU assumes no obligation to enter into any contract based on any offer and reserves the right to reject all offers and to consider other sources of supply at any time. An agreement will only be considered final when a contract (and a Purchase Order in some cases) are completed.

I. Introduction

About Marquette University

Marquette University is a Jesuit and Catholic university established in downtown Milwaukee, Wisconsin in 1881 as an “academy for learning.” We have an enrollment totaling approximately 11,000 undergraduate, graduate and doctoral students that represent all 50 states and over 75 foreign countries.

MU consists of nine undergraduate colleges and schools and three graduate schools. Our undergraduate Colleges of Health Sciences, Business Administration, Nursing and Engineering are regularly recognized by national publications and surveys for excellence in their fields. The University as a whole is also known for both academic excellence as well as our dedication to service and ethics-based curriculum. Faculty, staff, students and visitors alike will all recognize the motto “Cura Personalis” (or “Care for the Whole Person”) as a cornerstone of living and learning at Marquette University.

Supplier Diversity Business Statement

The University believes it is important to support the establishment, preservation and strengthening of ethnically diverse and women owned businesses. We seek opportunities to involve such businesses in the University’s purchasing process, and we also encourage our contractors and suppliers to provide for their participation through meaningful partnerships, joint ventures, subcontracts and other contractual opportunities.

Like any business decision, the selection of a supplier must make sense financially, but it is not solely a financial decision. Just as in any given case, we consider not just price but value, so we must also consider how the choice we make reflects our institutional values. When multiple bids or proposals are received or when multiple suppliers offer a good or service, and when the goods or services provided by more than one supplier are substantially similar in: (1) conformity with specifications or need; (2) quality; and (3) cost, and one or more of the suppliers is an ethnically diverse or women owned supplier, the University shall prefer the good or service provided by the ethnically diverse or women owned supplier.

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II. Supplier Requirements

The following pages represent minimum information requirements. Read the entire document first to gain an understanding of the questions. **Responses to the questions below must be placed in column X of the Supplier Information file, tab Appendix X.** If your company has any additional information in the following areas or offers an **additional service or opportunity which may be of interest to MU, please indicate so on tab Appendix X of the Supplier Information file.** Exceptions to any requirement set forth in this RFP must be stated in Appendix X of the Supplier Information file under the heading "Exceptions." Any exceptions stated in any other location of the response will be considered waived.

About Your Company

1. Please provide a company profile, including number of years in business, number of employees, locations, etc. Include all partner companies and subsidiary relationships that will take part in delivering products and services.
2. If you are a subsidiary of a parent company, provide the same information requested above for the parent company.
3. Describe your annual sales volume by market segment.
4. Please submit financial statements for the last two fiscal years.
5. Please submit a copy of your standard contract.
6. Has your company been involved in any reorganization, acquisition or merger within the last four years? Please indicate any name changes your company has gone through and the reason.
7. Has your company ever filed for bankruptcy? If so, please provide full details.
8. Provide a brief overview of company services and describe the areas of core competency within your organization.
9. Where are your corporate headquarters?
10. What is your Internet address?
11. Who would be the senior sales manager overseeing an account with Marquette University?
12. Who is your strongest competition and why? How are you staying ahead of your competition?
13. Has your organization ever been awarded an agreement for THIS TYPE OF PRODUCT/SERVICE and was such contract cancelled "for cause" prior to the completion date? If yes, please list and explain each incident.
14. Provide references for three similar accounts (in terms of volume and customer type) now being serviced, for whom comparable work has been performed. This list shall include company name, person to contact, address and telephone number. (By provision of this requested information, the respondent authorizes the university to make any necessary contact, written or oral, with the references provided above to obtain additional information regarding the respondent's experience and capability to perform under a supplier arrangement.)

About INSERT RFP TOPIC

15. Describe your organization's product breath with regard to standard products both at your local/primary location and at the distribution center nearest to Milwaukee, WI.
16. Describe your organization's product breath with regard to custom and specialty products both at your local/primary location and at the distribution center nearest to Milwaukee, WI.

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17. Does your organization have an expandable product offering when the general catalog does not contain the desired item? Please describe.
18. List the top five suppliers to your business.
19. Describe your product warranty and provide documentation.

Customer Service

20. What location would handle MU's regular orders?
21. Who would be MU's sales representative/point of contact, and what are his/her years of service, experience, tenure with the organization and location?
22. Who would be our customer service contact and what is his/her experience?
23. Who would MU call regarding questions or following up on transactions? Additionally, what is the escalation path if there are issues with customer service?
24. Describe value-added services your company offers.
25. Describe your order return policy, indicating any restocking fees and time requirements. In the case of defective materials, what is required to get a replacement item shipped? Please detail the freight policy, delivery of prepaid labels to the customer and shipment timing for returns.
26. Can your firm accept both purchase orders and credit cards?

Ordering

27. How does your company accept orders (e.g. online, over the phone, via fax, etc)?
28. What does your firm offer in terms of online ordering?
29. Can a customized online storefront be set up for MU? Provide a sample URL.
30. What has your company found to be the most successful procedure regarding multiple users on an account? Do multiple users access the same account or do they require unique log-in credentials?
31. Can users view previous and pending purchases?
32. What capabilities exist for MU to limit users from making certain purchases (i.e. how can categories of products and/or particular SKUs be removed from search results)?
33. What information regarding orders can be viewed online?
34. How does your company use the Internet to allow customers to track individual shipments? Provide a sample URL.

Order Fulfillment

35. List the warehouses that would supply Marquette in order from primary to secondary.
36. Describe the inventory volume of product warehoused locally and nationally.
37. How many different SKUs are stocked at the primary warehouse?
38. What is the first run order fulfillment rate at the primary warehouse?
39. What percentage of inventory does your organization purchase from manufacturers? What percentage comes from other distribution partners?
40. Individual pack slips are required for each department/address where product has been shipped. Can your fulfillment system provide this level of documentation?
41. Are deliveries made with a company owned truck, via a privately contracted delivery company or via a common carrier?
42. What is the order cut off time for same day order from the primary distribution warehouse?
43. What is the average ground shipment transit time from the primary distribution warehouse to Milwaukee, WI, ZIP code 53233?

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44. What is your delivery success rate (i.e. how often are orders delivered on time)?

Pricing

Tab Appendix X contains a variety of products which represent approximately INSERT PERCENT of the fiscal year 20XX spend in this commodity. **Place your company's best price for those items in column X of the Supplier Information file, tab Appendix X.**

It is important for the campus community to find value not only in the service component of a business relationship, but also in the true cost of goods sold. Because of this, we are asking for a pricing model that will ensure low cost access to the breadth of your product line. **All prices quoted should include no-charge freight and delivery.**

- 48. What pricing program are you proposing (cost plus, discount from list, etc)?
- 49. What is the length of price guarantee relative to this RFP response?
- 50. Does your organization sell any products below cost?
- 51. How does the award of a sole source versus dual source agreement modify the pricing structure?
- 52. Marquette University requires that not only the items in Appendix X be individually quoted, but also that a standard pricing program be in place for all other purchases. For those items that MU will purchase which are not listed on Appendix X, what is the pricing program?

Account Set-up and Implementation

- 53. Describe your organization's implementation process after being awarded a multi-year contract by a new customer.
- 54. Attach a sample implementation project plan.

Reporting and Business Management

At the end of each 90-day period, or as requested, the supplier shall meet with the University's representative to review performance and forecast future activities. The supplier shall provide activity reports to the University every 90 days.

- 55. Provide standard account management report samples.
- 56. The chosen supplier, at the supplier's expense, will perform an annual satisfaction survey. Please provide a sample of a survey you have used in other environments.
- 57. Does your organization offer a customer-accessible reporting tool so spend information can be extracted by the customer?
- 58. Does your organization routinely provide a forum for feedback from the customer? If so, include an example of such feedback.

Principles of Supplier Conduct

The University strives to promote business partnerships with suppliers who support justice, promote protection of the environment, respect the dignity of the human person, and value employees and their communities. Listed below are some basic questions regarding your company's commitment to these principles.

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59. What environmental programs or recognized standards have you implemented? Do you participate in any programs?
60. What do you require of your vendors and subcontractors? Do you manage your vendor relationships (sub-contractor relationships)?

The University does not discriminate in any manner contrary to law or justice on the basis of race, color, sex, age, sexual orientation, religion, disability, veteran's status or national origin. Please verify that your company complies with all applicable federal and state employment laws and describe any specific efforts that go beyond what is required by law.

61. What is your employee safety record and describe your occupational safety and health program?
62. To what extent do you manage your subcontractor and vendor agreements to ensure satisfactory employment practices?
63. The University believes in the recognition, promotion and implementation of the concept of the "living wage." "Living wage" is generally defined as the right of every full-time worker to be able to earn enough to cover his/her, as well as his/her family's, basic rights to shelter, food, clothing, education, health care and retirement. With this definition, it is clear that a "living wage" must exceed the Federal "minimum wage" (Currently \$7.25/hr). Do you have any similar policies?

The University is committed to furthering ethnically diverse and women owned businesses (see Supplier Diversity Business Statement on page 3).

64. Does your company have any ethnically diverse or women owned business goals?
65. Does your company have any ethnically diverse and women hiring goals?

III. General University Rules and Requirements

Warrant Response

We require our suppliers to warrant the answers they make in responding to a University RFP. A subsequent unwillingness to do so makes it impossible for the University to fairly compare RFP responses. Therefore, the selected supplier will be required to provide in the final contract a performance warranty of the statements made by it in its RFP response. Your submission of a response to this RFP represents your irrevocable agreement to this requirement.

Recycling and Source Reduction

To the extent practicable and cost effective, it is the desire of the University to encourage and promote the purchase of products which are composed of recycled, reusable, refillable or repairable content. The University prefers content which is durable and less toxic – again, to the extent practicable and cost-effective.

We also encourage and promote using recycled/recyclable material in the packaging of products purchased. While no sacrifice in quality of packaging will be acceptable, MU also encourages the use of the minimally

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effective quantity of packing material. The supplier remains responsible for providing packaging that will protect the product and contain it for its intended use.

- Suppliers are strongly urged to bring solutions to the attention of the University.
- Suppliers must remove from the premises all debris generated at the job site.
- Suppliers cannot use University trash/debris collection points for this purpose.

Behavior on Campus

To assist with the efficient operation of the University and to ensure the safety and well being of those at the University, rules of conduct are in force. Violations include, but are not limited to:

- Unauthorized use and /or possession of intoxicating beverages, narcotics or drugs on University premises.
- Threatening, intimidating or harassing others on University property.
- Carrying weapons on University premises, unless specifically preauthorized to do so, e.g., employees of Public Safety.
- Behaving in an overtly discourteous, abusive or disrespectful manner towards employees or students of the University.
- Stealing, unauthorized removal, use, loss, damage or destruction of property belonging to the University, its visitors, students and employees.
- Demonstrating any conduct or behavior which constitutes sexual harassment, racial abuse or discrimination.

Driving on Campus

For the safety of our community and visitors, the university has developed rules for driving on campus. The specific rules will be presented as we get into the next round of negotiations. A map describing driving on campus malls can be viewed online at the following address:

<http://www.marquette.edu/parking/documents/VehicularAccessMap.pdf>

Confidentiality, Use of Name and Use of Materials

This request for proposal and its information, including information that is disclosed during the proposal process, should be considered confidential. By accepting the RFP, your company agrees not to release this information to any external parties without the express and written consent of Marquette University. MU will hold your company's proposal in confidence; however, the information will be made available to all project team members assisting in the evaluation process.

Supplier agrees that it will not release any information relating its business relationship with the University, including, without limitations, press releases, advertisements or marketing materials, without prior written approval by the University. Supplier acknowledges that all drawings, specifications, data, memoranda, calculations, notes and other materials or copies thereof made available to supplier by the University or generated by supplier using the University's information shall remain the sole and exclusive property of the University and will be returned upon request to the University.

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Independent Contractors

The parties hereto are independent contractors. Nothing in this or a signed agreement shall be understood or construed to create or imply any relationship between the parties in the nature of any joint venture, employer/employee, principal/agent or partnership.

Terms and Conditions

In addition to the above, the supplier agrees with all terms and conditions contained in the Terms and Conditions found at the address below. Please indicate Agreed to by/Date on the Supplier Information file, tab Appendix B.

<http://www.marquette.edu/vendors/vendor/documents/9.2006PurchaseOrderTermsandConditions.pdf>

Any purchase order issued by the University in connection with this Agreement is intended only to establish payment authority for the University's internal accounting purposes. The terms and conditions of any such purchase order do not constitute a counteroffer, amendment, modification, revision, or supplement to the terms of this Agreement, and no term or condition of any such purchase order shall be part of this agreement. All invoices not referencing a University Purchase Order Number or more than one University Purchase Order number will be rejected. The total amount invoiced under this Agreement may not be greater than the amount stated on the University Purchase Order.

IV. Request Preparation and Submission Requirements

Process

RFP responses will be reviewed by the end user department. If required, the end user or the purchasing department will request additional information and a presentation of services. After agreement on the supplier, we will award the contract.

Estimated Timeline

Activity	Deadline
RFP Release	Date of release
Suppliers' questions regarding the RFP due	+ 1 week
Answers to suppliers' questions regarding the RFP due	+1 week
RFP Response due	+2 weeks
Supplier presentations, if necessary	+1 week
Supplier selection	+1 week
Proposed implementation start time	+2 weeks

Please submit all supplier questions via email to INSERT CONTACT INFORMATION to ensure proper response.

Agreement Term

The term of the agreement will be for INSERT DESIRED CONTRACT LENGTH.

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Proposal Submission Information

Submission address:

Marquette University
INSERT DEPARTMENT
Attn: INSERT RECEIPIENT(S) NAME(S)
INSERT ADDRESS
Milwaukee, WI 53233

Phone: INSERT PHONE NUMBER
Fax: INSERT FAX NUMBER
Email: INSERT EMAIL ADDRESS

Please provide two hard copies and one electronic copy (disk) of your proposal no later than DUE TIME on DUE DATE. Submissions made via email will not be acknowledged.

If you have any questions regarding this request, please contact NAME(S) OF CONTACT(S) for information via email.