



**Francis Marion University
Request for Proposal
Amendment #2**

Solicitation Number **RFP-2292**
Date Issued **12/8/2017**
Purchasing Officer **Paul J. MacDonald**
Phone **(843) 661-1161**
E-Mail Address **pmacdonald@fmarion.edu**
Amendment Date **01/24/2018**

DESCRIPTION: **Provide Default Management and Default Aversion Services for Francis Marion University**

The Term "Offer" Means Your "Bid" or "Proposal".

SUBMIT OFFER BY (Opening Date/Time): ~~01/18/2018 at 2:00 PM EST~~ **02/08/2018 at 2:00pm** See "Deadline For Submission Of Offer" provision

QUESTIONS MUST BE RECEIVED BY: ~~01/03/2018 at 2:00 PM EST~~ See "Questions From Offerors" provision

NUMBER OF COPIES TO BE SUBMITTED: **One (1) original in hard copy, three (3) copies in hard copy clearly marked "COPY," one Magnetic Media as Specified and One (1) Redacted Copy as Specified.**

SUBMIT YOUR OFFER TO ONE OF THE FOLLOWING ADDRESSES IN A SEALED PACKAGE.

MAILING ADDRESS: Francis Marion University Purchasing Office P.O. Box 100547 Florence, SC 29502-0547	EXPRESS SHIPPING ADDRESS: Francis Marion University Central Receiving 4822 E. Palmetto Street Florence, SC 29506	HAND-DELIVERY: Francis Marion University Purchasing Office (Room 102) Stokes Administration Building 4822 E. Palmetto Street Florence, SC 29506
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CONFERENCE TYPE: **N/A**
DATE & TIME: **N/A**
As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions

LOCATION:
**Francis Marion University
Stokes Administration Building
Board Room
4822 East Palmetto Street
Florence, SC 29506**

AWARD & AMENDMENTS
An **Award** will be posted at the Physical Address stated above on or around **01/25/2017 02/15/2018**.
The award, this solicitation, and any amendments will be posted at the following web address:
<http://www.fmarion.edu/about/solicitationsandawards> <http://www.fmarion.edu/about/solicitationsawards>

You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the Opening Date.

NAME OF OFFEROR (Full legal name of business submitting the offer)		OFFEROR'S TYPE OF ENTITY: (Check one) <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) <input type="checkbox"/> Other _____
AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)		
TITLE (Business title of person signing above)		
PRINTED NAME (Printed name of person signing above)	DATE SIGNED	

(See "Signing Your Offer" provision.)

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.

STATE OF INCORPORATION
(If Offeror is a corporation, identify the state of Incorporation.)

TAXPAYER IDENTIFICATION NO.
(See "Taxpayer Identification Number" provision)

PAGE TWO

(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)
	Address
	Area Code - Number - Extension Facsimile
	E-mail Address

PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses)
___ Payment Address same as Home Office Address ___ Payment Address same as Notice Address (check only one)	___ Order Address same as Home Office Address ___ Order Address same as Notice Address (check only one)

ACKNOWLEDGMENT OF AMENDMENTS Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)							
Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date

DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	_____ Calendar Days (%)
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Amendment 2

RFP-2292 Provide Default Aversion Services for Francis Marion University

AMENDMENTS TO SOLICITATION

- (a) The Solicitation may be amended at any time prior to opening.
- (b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment.
- (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

Modifications

- Please see change to the Questions Due Date, Submittal Due Date, and Anticipated Award Date on page 1 of this document.**
- Page 21 – Qualifications – Mandatory Minimum (Jan 2006) clause has been removed from the solicitation as no mandatory minimum qualifications were set.

QUALIFICATIONS – MANDATORY MINIMUM (JAN 2006)

- (a) In order to be qualified to receive award, you must meet the following mandatory minimum qualifications:
- (b) The Procurement Officer may, in his discretion, consider (1) the experience of a predecessor firm or of a firm's key personnel which was obtained prior to the date offeror was established, and/or (2) any subcontractor proposed by offeror.
- (c) Provide a detailed, narrative statement providing adequate information to establish that you meet all the requirements stated in subparagraph (a) above. Include all appropriate documentation.
- [05-5010-1]

- Page 16, 3.0 Company Experience & Qualifications, item 4. edited
Include examples of similar types of comprehensive student debt education management assignments that the Offeror's firm has been engaged in for other higher education and/or state or federal government agencies. At a minimum, three (3) references shall be included who can verify the Offeror's expertise, which are, or have been, clients of the Offeror. Complete Attachment ~~3~~ **1** entitled "~~Offeror Information –~~ References."

Questions from Vendors

Question 1	Does the College have a prior provider? If so, what vendor?								
Answer	The University's prior provider was American Student Assistance.								
Question 2	Page 13, How many borrowers are in repayment for FY 2015, FY 2016 and FY 2017?								
Answer	Because American Student Assistance has ceased to provide this service as of 12/31/17, we only have data as to the number of students entering in to repayment for FY 2015, FY 2016, and FY 2017 as follows <table border="1" data-bbox="402 1598 919 1759"><thead><tr><th>Cohort</th><th># entered in to Repayment</th></tr></thead><tbody><tr><td>FY 2017</td><td>1168</td></tr><tr><td>FY 2016</td><td>1051</td></tr><tr><td>FY 2015</td><td>1053</td></tr></tbody></table>	Cohort	# entered in to Repayment	FY 2017	1168	FY 2016	1051	FY 2015	1053
Cohort	# entered in to Repayment								
FY 2017	1168								
FY 2016	1051								
FY 2015	1053								
Question 3	Page 33, should the vendor assume the unit price is for providing services for students in grace, in repayment but current, and in repayment and delinquent?								
Answer	Yes, the unit price is for providing services for students in grace, in repayment but current, and in repayment and delinquent.								

Question 4	<p>Total borrowers currently in repayment that are identified as needing Default Aversion/Management is 825. Delinquency detail has ~ 700 in total, which includes ~245 in FY 2015, a closed cohort year. That leaves ~ 450 in active cohorts (FY2016/17)</p> <p>Are the 825 borrowers currently in repayment and targeted as requiring Default Aversion/Management those that are currently delinquent plus additional borrowers likely to become delinquent during the first contract year? If not, could you please describe what constitutes the pool of 825 borrowers identified?</p>								
Answer	<p>Because American Student Assistance has ceased to provide this service as of 12/31/17, we only have data as to the number of students entering in to repayment for FY 2015, FY 2016, and FY 2017 as follows</p> <table border="1" data-bbox="402 499 919 659"> <thead> <tr> <th>Cohort</th> <th># entered in to Repayment</th> </tr> </thead> <tbody> <tr> <td>FY 2017</td> <td>1168</td> </tr> <tr> <td>FY 2016</td> <td>1051</td> </tr> <tr> <td>FY 2015</td> <td>1053</td> </tr> </tbody> </table> <p>However, we would like students who not only entered into repayment, but also those who are in their 6 month grace period to receive default management/aversion.</p>	Cohort	# entered in to Repayment	FY 2017	1168	FY 2016	1051	FY 2015	1053
Cohort	# entered in to Repayment								
FY 2017	1168								
FY 2016	1051								
FY 2015	1053								
Question 5	<p>Per Question 4 “Total borrowers...”</p> <p>Will the servicer need to include in the estimate the support of FY2015, one of the years for which delinquent borrower information was supplied which is a cohort year that is no longer active in the default management reporting window with the Department?</p>								
Answer	<p>No, the servicer does not need to include in the estimate the support for Fiscal Year 2015.</p>								
Question 6	<p>Per Question 4 “Total borrowers...”</p> <p>The delinquency detail provided here was generated as of what date?</p>								
Answer	<p>The delinquency detail provided here was generated as of 11/20/2017.</p>								
Question 7	<p>In reference to Question 4 “Total borrowers...”</p> <p>For each fiscal year being requested for support, would the university please supply numerator and denominator data and the “as of” date for the information?</p>								
Answer	<p>As 2016 and 2017 are future dates, below is data for Fiscal Years 2014 and 2015, each is as of 1/17/2018:</p> <p>Fiscal Year 2014: 103/1193</p> <p>Fiscal Year 2015: 48/910</p> <p>Fiscal Year 2016: this information is unavailable due to calculation requiring a future date.</p> <p>Fiscal Year 2017: this information is unavailable due to calculation requiring a future date.</p>								
Question 8	<p>Section A, Item 2 – does the University have a preferred or expected method of contact to borrowers in repayment and current?</p>								
Answer	<p>Provide your best proposed method(s) of contact to borrowers both current and in repayment.</p>								
Question 9	<p>Section A, Item 3 – At what stage (number of days delinquent) is outreach to delinquent borrowers expected to begin?</p>								
Answer	<p>For page 13, item A, #3, follow up with students that have become delinquent Shall be initiated beginning 30 days after delinquency occurs.</p>								
Question 10	<p>Is that to be understood for the Bidding Chart (Page 33) that the Unit Price is fixed and that the extended annual price may vary based on the actual quantity of the borrowers serviced? Or is the extended price also required to be fixed within a single contract year?</p>								
Answer	<p>The Unit Price is fixed, but the extended annual price may vary based upon the actual quantity of borrowers serviced. The extended price is NOT required to be fixed within a single contract year.</p>								

Question 11	Does the bidding chart for Items 2-6, require a single price or can the chart be modified? If not, will an itemization be acceptable to include with the bidding chart to reflect pricing options that accomplish the University’s Default Aversion, Default Management, and other goals?
Answer	Offerors should use the exact format for Section VIII: Bidding Schedule. Please email the Purchasing Office at pmacdonald@fmarion.edu if a Word version of Section VIII will be helpful.
Question 12	Page 21, Qualifications – Mandatory Minimum (c) states that the vendor provide a detailed, narrative statement that you meet all requirements in (a). There are no requirements listed in (a). Can the school provide the requirements to be included in our narrative?
Answer	See Modification #2
Question 13	Page 21, Qualification – Required Information (b) states that “The requirement for Financial Information is not necessary with the offeror’s submission; but may be requested by the Procurement Officer prior to award.” Does the vendor need to include three years of audited financial statements with their submission?
Answer	No Change – the vendor is not required to include three years of audited financial statements with their submission, however this may be requested by the Procurement Officer prior to an award.
Question 14	Page 18/19, what section of the RFP would the College like the vendor to include the Minority Participation & Offshore Contracting answers?
Answer	Include the Minority Participation and Offshore Contracting answers in the Business Proposal
Question 15	Can you confirm whether being a state registered vendor is requirement or optional. I want to ensure we are not missing anything.
Answer	No Change, see page 8 – Vendor Registration Optional (FMU NOV 2011)
Question 16	Page 16, 3.0 Company Experience & Qualifications #4 – You ask that we complete Attachment 3 entitled “Offeror Information – References.” However, Attachment 3 is entitled “Iran Divestment Act of 2014.” We did not locate an attachment titled “Offeror Information – References.” Should the RFP be amended to reach Attachment 1 – References?
Answer	See Modification #3
Question 17	Page 21, Qualifications – Required Information (f) – What is meant by “failed projects?”
Answer	For the purposes of this submittal, a failed project would be a contract entered in to with another entity in good faith, for which that contract was not seen to its conclusion.
Question 18	Page 37, Attachment 2 – Non Resident Taxpayer Registration Affidavit Income Withholding - We are a state-based governmental organization that will be conducting the services outside the state of SC. If we are not required to complete an affidavit, do we need to submit Attachment 2?
Answer	If an offeror is not required to complete an affidavit, that offeror is not required to submit Attachment 2.

Vendor: _____

Authorized Signature: _____
(Same signature as individual who signed cover page of the solicitation)

Date: _____

END OF AMENDMENT 2