
University of California, Santa Barbara
REQUEST FOR PROPOSAL #HB06162026P

Student Housing Reservation System

Attachments

Bidder's Acceptance Form & Required Supplier Information	Attachment A
University of California Business Information Form (BIF)	Attachment B
UC Insurance Requirements	Attachment C
Proposal Response Form	Attachment D
Bid Price Form	Attachment E
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A. Purpose & Objectives

The purpose of this Request for Proposal ("RFP") is to invite qualified suppliers to prepare and submit a Proposal to provide a student housing reservation system at the University of California, Santa Barbara, ("UCSB" or "University"), in accordance with the requirements defined throughout this RFP.

UCSB's objective is to establish the most cost effective and efficient service contract that will provide maximum value to the University through enhanced technology, superior customer service, streamlined processes, sustainable practices, and lowest total cost.

UCSB will issue a written contract for the services listed in this RFP to the awarded supplier ("Awardee"). Individual UCSB departments will then issue purchase orders for services as needed to the Awardee, such purchase orders will be governed by the contract. UCSB's payment terms are Net 30.

B. Campus Overview

Situated on the ocean along California's Central Coast, UC Santa Barbara has approximately 25,000 undergraduate, graduate, and doctoral students, while employing over 11,000 staff, students, teaching assistants, librarians, tenured faculty and lecturers. UCSB has 10 residence halls and more than a dozen apartment complexes to house students and faculty. Princeton Review's 2022 Top 50 Green Colleges list ranks UC Santa Barbara No. 10 out of 420 qualifying colleges worldwide, placing it among the top choices for students seeking to live and learn on a sustainability-focused campus. In its 2022 listing of "Top Public Schools," U.S. News & World Report ranked UC Santa Barbara No. 5. For more information about UC Santa Barbara refer to the campus website: <http://www.ucsb.edu/>

C. Contract Term

It is anticipated that the initial term of any contract awarded pursuant to this RFP will be for a blanket period of five (5) years with the ability to extend annually thereafter, not to exceed ten (10) years total.

D. Bid Administrators and No Contact Policy

The UCSB Bid Administrators for this RFP are Jessica Rodriguez email: jessrodriguez@ucsb.edu and Henry Biliniewicz, email: henrybiliniewicz@ucsb.edu. During the period of this RFP bid process, any contact initiated by the Bidder to anyone at UCSB other than the UCSB Bid Administrator or the UCSB Purchasing Department is prohibited. Any such unauthorized contact may cause the disqualification of the Bidder from the RFP. Once an Apparent Awardee has been notified of a contract award, the awarding Bidder may be connected by the Bid Administrator to the UCSB campus end user.

E. Bidder Qualification – Minimum Mandatory Requirements

Minimum Mandatory Requirements are defined as requirements essential to UCSB for bid consideration. Automatic disqualification from the bidding process will result from bidder's failure to provide or be in compliance with any one or more of the following requirements.

- All bidders must provide their bid response using the CalUSource bid tool.
- All bidders must agree to the terms in the document titled "Bidder's Acceptance Form & Required Supplier Information."
- All bidders must meet the specifications defined in the Product and Service Specifications, Section K.
- All bidders must complete and re-upload the attached Bidder's Acceptance Form (Attachment A), University of California Business Information Form (Attachment B), Proposal Response Form (Attachment D) and Bidder Price Form (Attachment E).
- Apparent Awardee must be able to provide a Certificate of Insurance matching the requirements outlined in Attachment C.
- All bidders must only use the template documents UC provides for this bid, in the same format required. (i.e. Proposal Response Form in Word, or Bid Price Form in Excel, etc.)
- Apparent Awardee must comply with the UC Patronage Incentive: Awardee will provide a quarterly patronage incentive rebate check of 2% on total sales for invoices awarded under this contract

F. RFP Timeline

The following schedule outlines the timeline for this RFP. A supplier may be disqualified for failing to adhere to the dates and times for supplier performance specified below (all times Pacific Daylight Time):

Date	Time	Event
Tuesday, June 16, 2026	4:00PM	RFP Posts and Bidders are notified
Friday, June 26, 2026	4:00PM	Bidder requests for clarification of RFP due
Thursday, July 2, 2026	4:00PM	Bids due to UC

G. Proposal Acceptance Period

"Acceptance Period" as used in this provision, means the number of calendar days available to the University for awarding a contract. All bids and their pricing shall remain available for University acceptance for a minimum of 180 days following the RFP closing date.

H. Proposal Evaluation and Contract Award

This solicitation, the evaluation of proposals, and the award of any resulting contract shall be made in conformance with applicable University policies and State of California law. The University reserves the right to withdraw this RFP at any time. All documents submitted to UC on behalf of this RFP will become the exclusive property of the UC system and will not be returned.

Any contract(s) resulting from this RFP will be awarded to the responsive and responsible Bidder whose proposal, in the opinion of the University, offers the greatest benefit to the University when considering the Best Value, including, but not limited to, the quality of products, services, support, and total life cycle cost. A responsive Bidder is one whose offer satisfies the Requirements of this RFP. A responsible Bidder is one that is considered capable of performing and is otherwise eligible and qualified to perform in the manner stated in this RFP.

Proposal Evaluation

Proposals will be evaluated by the University using a Best Value bid evaluation methodology, per [University of California Policy BUS-43](#). To determine the Best Value proposal, the University Evaluators will first determine the proposals' Quality Points Score by scoring the proposals based on a uniform set of weighted evaluation criteria.

Factors that may be used to evaluate proposals include the answers to questions in Attachment D, which includes sustainability.

Each proposal's Quality Points Score will be the average of all Evaluators' total scores awarded for the proposal's weighted evaluation criteria. Bidders must meet a minimum Quality Points threshold of 70%.

The University will then determine each proposal's Price/Cost Score. Price/Cost is scored based on the predetermined percentage of the total available points. Price/Cost from all bidders will be "normalized" with the lowest bidder receiving 100% of the total available points and the other bidders receiving a percentage of the total available points per the sample calculation below:

<u>Sample Price/Cost Normalization</u>	<u>Total Price/Cost Points Available – 500</u>
Bidder #1: Low bidder at \$50,000 receives maximum points	500
Bidder #2: Next lowest bidder at \$55,000 receives 90.9% of max points (\$50,000 divided by \$55,000 = 90.9% X 500 = 455)	455
Bidder #3: Highest bidder at \$60,000 receives 83.3% of max points (\$50,000 divided by \$60,000 = 83.3% X 500 = 417)	417

Each proposal's Price/Cost Score will then be added to that proposal's Quality Point Score to get the proposal's Total Score. The proposal with the highest overall Total Score will be considered the lowest responsible bidder with Best Value in terms of price/cost, quality, service and other performance criteria that meet the University's requirements.

Contract Award

The University may elect to conduct the bidder selection process using two or three phases based on the need for presentations:

Phase I - Minimum/Mandatory Requirements: Bidders shall be eliminated from further consideration if Section E: Bidder Qualifications – Minimum Mandatory Requirements are not met.

Phase II - Bidder's Proposal Evaluation: Evaluation criteria will be based on responses to the RFP requirements in Attachment D.

Phase III - Bidder's In-person Presentation, Demo, Phone Conference, or Interview: Top Bidder's from Phase II may be invited to present their company's qualifications and RFP responses. Clarifying information from the oral presentation/demonstration may be considered when evaluating the proposals. The UC reserves the right to eliminate the oral presentation/demonstration if it determines the written bids sufficiently address the evaluation criteria.

The University may waive irregularities in a proposal provided that, in the judgment of the University, such action will not negate fair competition and will permit proper comparative evaluation of bids submitted. The University's waiver of an immaterial deviation or defect shall in no way modify the RFP documents or excuse the Bidder from full compliance with the RFP specifications in the event the contract is awarded to that Bidder.

The University reserves the right to accept or reject any or all bids, make more than one award, or no award, as the best interests of University may appear. Any contract awarded pursuant to this RFP will incorporate the requirements and specifications contained in the RFP, as well the contents of the Bidder's proposal as accepted by the University and will be in writing.

The University's selection may be made on the basis of the initial proposals or may elect to negotiate with bidders selected as finalists. The University reserves the right to negotiate the modification of proposed prices, terms and conditions with the bidder offering the best value to the University prior to the execution of an Agreement.

I. Termination of Agreement

Any agreement resulting from this RFP may be terminated in whole or in part by University (for cause and/or for convenience) with a written thirty (30) day notice without penalty. Any agreement resulting from this RFP may be terminated in whole or in part by Supplier (for cause only) with a written thirty (30) day notice without penalty.

J. Order of Precedence

In matters of conflicts of terms, the order of precedence shall be as follows:

- 1) Purchase Order(s) awarded from the RFP;
- 2) The RFP Document and any subsequent Addenda;
- 3) The University of California Terms and Conditions for Purchase:
<https://procurement.ucop.edu/resources/p-policies#supplier-documents>

K. Scope of Work

Bidders responding to this RFP must be able to provide the specifications defined in this section.

UCSB Housing Platform: Statement of Work

Project Overview

UC Santa Barbara (UCSB) seeks a modern Housing Management Platform to replace its current legacy housing management system, RMS Mercury, which will reach end-of-support in 2028. The replacement solution must support the operational needs of Housing, Dining & Auxiliary Enterprises (HDAE) while providing a scalable foundation for future growth.

The system must support the management of approximately 10,500 active bed spaces across multiple housing communities, including Residence Halls, Undergraduate Apartments, Graduate Apartments, Family Student Housing, Faculty and Staff Housing, and short-term housing. The platform must also accommodate the addition of approximately 2,500 additional beds as future housing developments come online.

The selected solution should demonstrate experience supporting higher education housing operations of comparable size and complexity and provide a secure, modern, cloud-based platform that improves operational efficiency, enhances the resident experience, and supports integration with UCSB's existing campus systems and external partners.

Project Objectives

The primary objectives of this project are to:

- Replace the existing RMS Mercury platform with a modern housing management solution that meets UCSB's operational, business, and compliance requirements.
- Improve administrative efficiency through automation of housing workflows and routine operational tasks.
- Enhance the student experience through self-service functionality, ADA accessibility, and mobile-responsive access to housing services.
- Support future housing growth and evolving business requirements through configurable workflows and scalable system architecture.
- Maintain or improve integration capabilities with campus systems, including billing, identity management, dining, access control, and student information systems.

Functional Requirements

Housing Contracts Management

The system must securely support comprehensive contract lifecycle management, including:

- Generation, distribution, and storage of signed and unsigned housing contracts.
- Support for multiple contract signers, including non-student occupants, parents, guardians, and co-signers for students under 18 years of age.
- Tracking and reporting of signature status, including visibility into completed and outstanding signatures.
- Administrative monitoring and management of contract completion workflows.

Space and Rate Management

The system must provide flexible occupancy and rate management capabilities, including:

- The ability to close, hold, reserve, and release rooms or bed spaces.
- Support for multiple rate structures based on space type, housing community, and occupant category.
- The ability to charge different rates for the same room type based on resident eligibility or classification.
- Support for multiple property types, including residence halls, graduate housing, family student housing, apartments, and faculty/staff housing.

User Access and Security

The system must include configurable role-based security and permissions, including:

- Ability to securely store data according to the IS-3 Classification levels as outlined by UC Policy.
- User access controls based on role and responsibility.
- Separate permission structures for administrative staff, student users, and other user groups.
- The ability to assign varying levels of administrative access across departments and business functions.
- The ability to anonymize user data to comply with UC Record Retention Policy.

Workflow Automation

The platform must support automated business processes, including:

- Automated waitlist management and resident opt-in workflows.
- Scheduled contract, payment, and deadline reminders.
- Configurable workflow triggers and notifications to reduce manual administrative effort.

Billing and Financial Integration

The solution must support integration with UCSB's billing environment, including:

- Import and export of billing-related data.
- Generation of flat-file exports for billing and reconciliation processes.
- Support for integration with existing campus financial and billing systems.
- Documentation of available interfaces, APIs, and data exchange methods.
- Ability to provide reports of financial data

Communications and Correspondence

The platform must support centralized communication capabilities, including:

- Bulk email correspondence to residents, applicants, and other stakeholders.
- Multiple sender profiles with configurable send-as and reply-to functionality.
- Tracking and management of outbound communications.

Dining and Meal Plan Management

The system must support resident meal plan administration, including:

- Student self-service meal plan enrollment.
- Meal plan changes and updates through the housing portal.
- Integration capabilities with UCSB dining systems where applicable.

Integration Requirements

The proposed solution should provide modern integration capabilities, including documented APIs and support for secure data exchange with campus systems. Vendors should describe their approach to integration with systems (including customized campus solutions) such as:

- Student Information Systems (SIS)
- Admissions systems
- Financial Aid systems
- Campus billing systems
- Identity and access management platforms
- Dining and meal plan systems
- Access control systems

Implementation Considerations

To ensure continuity of operations, the implementation approach should minimize disruption to students and staff throughout the transition period. Vendors should describe:

- Data migration methodology and validation processes.
- Strategies for maintaining operational continuity during implementation.
- Training and change management services.
- Post-implementation support and stabilization services.
- Identification of additional services and fees.

Implementation Timeline

- Procurement & Vendor Selection: May – September 2026
- Implementation Kickoff: Fall 2026
- Contracting and Application Go-Live: December 2026
- Assignment and Billing Go-Live: Spring 2027
- Full Operational Launch: Summer/Fall 2027