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UT System RFP - Research database to Support Horizon Fund Due Diligence ****UPDATED 07/30****

Open Date: 08/05/15 03:00 PM

Agency Requisition Number: OTC08052015

NOTE: You will need to download all of the following files for complete specifications and other required document, including a HUB subcontracting plan(if required).

Help: Right Click to and choose "save file as" or "save target as" to your computer.

-**Package 1** size: 80761 (in bytes) Type: Specification Format: Acrobat PDF Files

-**Package 2** size: 35472 (in bytes) Type: Additional Specification(s) Format: Acrobat PDF Files

****UPDATE 07/30/2015 - Add Q&A (Package 2)**** The University of Texas System ("UT System") is seeking to acquire data and technology provider to enable the UT Horizon Fund to perform due diligence analysis within the Office of Technology Commercialization ("Office"). The anticipated contract term will be two years from the effective date.

Agency: UNIVERSITY OF TEXAS SYSTEM (720)

Open Date: 08/05/15 03:00 PM

Agency Requisition Number: OTC08052015

Previous Price Paid: N/A

Solicitation type: 14 Days or more for entire solicitation package

NIGP Commodity Code(s):

Class-Item: 209 - 38

Contact Information:

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Upload Date: 2015-07-22 11:06:03.02 Updated date: 2015-07-30 11:08:32.567

The University of Texas System Request for Proposal for Data and Technology Provider to Support Due Diligence

RFP # OTC08052015

Overview: In this Request for Proposal (“RFP”), The University of Texas System (“UT System”) is seeking to acquire data and technology provider to enable the UT Horizon Fund to perform due diligence analysis within the Office of Technology Commercialization (“Office”). The anticipated contract term will be two years from the effective date.

Scope of Work: UT System is seeking a Data and Technology Provider that enables Office employees to have the tools and research database necessary to perform customary duties required in deal analysis based on venture capital/technology commercialization industry best practices. The Office at UT System also assists and equips the Offices of Technology Commercialization at the nine academic and six health institutions which make up UT System. The research database should be focused on the ability to understand the venture deal landscape and be specifically designed to support due diligence efforts. The user of the research database will need to be able to utilize the platform to perform benchmarking analysis, comparable analysis, deal pricing analysis, provide competitive landscape and perform industry trend analysis. Additionally, the service should also serve as a repository for active industry participants and enable Office employees to identify and research prospective buyers, co-investors, and lenders. The vendor should prepare their bid with the understanding that the prices for both two and four seats need to be included in their response. It is expected that a two year license will be provided.

Specifications: Any proposed Vendor (“Proposer”) submitting an offer in response to this RFP must provide the following:

1. proposer's legal name, including type of entity (individual, partnership, corporation, etc.), address and other contact information;
2. background information regarding the proposer, including the number of years in business and the number of employees;
3. the features and functionality offered by proposer's goods or services to serve the needs of UT system
4. the fees charged for providing access and any necessary services for either two or four UT System employees;
5. the earliest date by which the proposer could begin providing the access to the database;
6. a list of three client references, including any complex institutions or systems of higher education for which proposer has provided services;
7. any unique benefits the proposer would offer UT System, and any other information proposer desires UT System to consider in connection with proposer's offer;
8. information to assist UT System in assessing whether the proposer will have any conflicts of interest in providing the requested database;
9. information regarding any prompt payment discount offered by proposer (UT System's standard payment terms for services are Net 30 days); and information regarding discounts for institutions within UT System.

Selection Process: UT System may select the successful proposal(s) on the basis of the proposals initially submitted, without discussion, clarification or modification. In the alternative, UT System may select the successful proposal(s) on the basis of negotiation with the

proposers. In conducting any negotiations, UT System will avoid disclosing the contents of competing offers.

UT System is not obligated to select the Proposer offering the most attractive economic terms if that proposer is not the most advantageous to UT System overall, as determined by UT System.

UT System reserves the right to (a) enter into a contract for all or any portion of the requirements and specifications set forth in this RFP with one or more proposers, (b) reject any and all offers and re-solicit offers, or (c) reject any and all offers and temporarily or permanently abandon this selection process, if deemed to be in the best interests of UT System. UT System will maintain in its files concerning this RFP a written record of the basis upon which a selection, if any, is made by UT System. UT System reserves the right to accept or reject any or all offers, waive any formalities, procedural requirements, or minor technical inconsistencies, and delete any requirement or specification from this RFP when deemed to be in UT System's best interest.

Criteria for Selection: The successful proposal(s), if any, will be the proposal(s) submitted in response to this RFP, by the Submittal Deadline that is the most advantageous to UT System. The criteria to be considered by UT System in evaluating offers will be the competence of database to provide the required information, analytics offered and the reasonableness of the proposer's fee.

Proposals will be evaluated by UT System personnel. The selection of the successful proposal, if any, will be based on the information provided by proposer in its offer. UT System may give consideration to any additional information if UT System deems such information relevant. Any proposer submitting a successful proposal will be required to enter into a contract acceptable to UT System.

The criteria to be considered by University in evaluating proposals and selecting a Data and Technology Provider will be those factors listed below:

- The reputation of the Proposer and of the proposer's goods or services;
- The quality of the Proposer's goods or services (including usability, training and support);
- The extent to which the goods or services meet the University's needs;
- The total cost to the University of acquiring the Proposer's goods or services

Proposer's Acceptance of Offer Evaluation Methodology: Submission of an offer by a proposer indicates: (1) proposer's acceptance of the Selection Process, the Criteria for Selection, and all other requirements and specifications set forth in this RFP; and (2) proposer's recognition that some subjective judgments must be made by UT System during this RFP process.

Public Information: Proposers are hereby notified that UT System strictly adheres to all statutes, court decisions and the opinions of the Texas Attorney General with respect to disclosure of public information. UT System may seek to protect from disclosure all information submitted in response to this RFP until such time as a final contract is executed. Upon execution of a final contract, UT System will consider all information, documentation, and other materials requested to be submitted in response to this RFP to be of a non-confidential and non-proprietary nature and, therefore, subject to public disclosure under the Texas Public Information Act (Chapter 552.001, Gov. Code). Proposer will be advised of a request for public information that implicates their materials and will have the opportunity to raise any objections to

disclosure to the Texas Attorney General. Certain information may be protected from release under Sections 552.101, 552.110, 552.113, and 552.131, Gov. Code.

How to respond; Submittal Deadline: To respond to this RFP, proposers must submit the information requested in the Specifications section of this RFP and any other relevant information, in a clear and concise written format to:

Jenny Murphy
Director of Accounting & Purchasing Services
The University of Texas System Administration
210 West Sixth St.
Suite B. 140E
Austin, Texas 78701-2891

All offers must be received at the above address no later than 3:00 p.m. local time in Austin, Texas, on Wednesday, August 5, 2015 (Submittal Deadline). Submissions received after the Submittal Deadline will not be considered.

Questions. Questions concerning this RFP should be directed to Julie Goonewardene at jgoonewardene@utsystem.edu no later than Wednesday, July 29 2015. UT System may in its sole discretion respond in writing to questions concerning this RFP.

**The University of Texas System Request for Proposal for Data and
Technology Provider to Support Due Diligence
RFP # OTC08052015
Questions and Answers**

Q: Please provide guidance around “information to assist UT System in assessing whether the proposer will have any conflicts of interest in providing the requested database”.

A: Vendors are expected to utilize their internal conflict of interest processes and systems to ensure that no conflicts exist.