



DATE: May 6, 2016
TO: All Prospective Vendors
SUBJECT: **Request for Information# KA050616 Human Subjects & Research Payment Solutions and Programs**

The University of Connecticut, located in Storrs, Connecticut, hereinafter referred to as the University, hereby invites companies to submit information on their Human Subject & Research Payment Solutions and Programs and the associated implementation services.

The Offices of the Vice President for Research and the Executive Vice President for Administration and Chief Financial Officer, are exploring the potential use of a solution to assist with the administration, payment and compliance aspects when paying research participants. The solution should provide for robust reporting of information and data contained within the system as well as program analytics that are used in supporting human subjects and research participant payment solutions associated with research studies, clinical trials or other sponsored project related activities.

The University would also like to better understand if such solution(s) may be considered for application for other business areas that may contain similar needs.

The information submitted by your company may be used by the University to develop specifications for a Request for Proposal (RFP) anticipated to be issued in the near future. As part of your submission and at the University's own discretion, the University may request a presentation and onsite visit. All costs associated with the presentations, including travel, lodging and meals will be borne by the presenter(s). Actual presentation dates and times will be determined by your initial response to this request.

The scope of the project and the issues to be addressed in the presentation are outlined in the attached document.

Kristin Allen
Purchasing Agent II
University of Connecticut
Procurement Services
3 Discovery Drive, Unit 6076
Storrs, Connecticut 06269-6076

Phone: 860-486-0970
Email: kristin.allen@uconn.edu

**Request for Information KA050616:
Human Subjects & Research Payment Solutions and Programs**

Overview

The Office of the Vice President for Research (OVPR) is committed to assisting faculty at all UConn campuses in their pursuit of research excellence. The OVPR offers a broad range of varied services to support faculty in all aspects of their research and scholarship at the University of Connecticut and is the main point of service for all research-related needs, including: Funding support and training programs, such as grant-writing workshops; Research core facilities with cutting-edge instrumentation and equipment; Proposal preparation; Award management; Research compliance services, human subjects, biosafety/recombinant DNA, animal use, environmental health and safety, export controls, clinical trials, conflicts of interest, stem cell research, etc.; Technology commercialization support through patent protection, negotiating licenses, new company formation, startup incubation, etc.; and Research IT services, including implementation of advanced software solutions, a full suite of applications for use in the grant submission, approval and management process, etc.

The Finance and Budget Divisions of the Office of the EVPACFO is comprised of the Budget Office, Controller, Procurement Services and Treasury Services. The Division manages the financial resources of the University and strives to do so in a cost effective, collaborative manner. The Division is responsible for coordinating the development of financial plans, implementing the annual budget, financial reporting, accounting, procurement services, payroll and debt management.

The University is particularly interested in creating more efficient payment options and programs that include financial incentive for the Division. This would include travel, purchasing, vendor payments, employee payments/refunds and student payments/refunds.

Proposers' feedback may be used in the development of a RFP scope.

Submission Guidelines:

- Your written response and presentation must address each item in the Offering Details, Support & Continuing Services, Market Presence, and Partnerships sections below with specific examples, as well as quantitative and qualitative data.
- Additional information should be shown relative to the particular topic.

Office of the Executive Vice President for
Administration and Chief Financial Officer

Procurement Services

3 DISCOVERY DRIVE, UNIT 6076
STORRS, CT 06269-6076
PHONE 860.486.2619
FAX 860.486.5051
www.procurement.uconn.edu

Offering Details

Specifications & Capabilities

- Settlement/disbursement solutions Virtual Credit Card Programs
- Debit/Prepaid Card Programs
- Digital Disbursements
- Reporting and Tracking Capabilities
- 1099 Tax Reporting Compliance
- Confidentiality
- Data security/built-in internal controls and fraud detection

Project Management & Implementation Offering

- Quality Assurance, Testing and Reporting methodology
- Implementation and roll-out methodology
- Training and startup material

Operational Management

- Day to day operations
- Data storage, access and transmission

Support & Continuing Services

- Account team and availability of inside sales representative
- Availability of continuing support, technical, and consulting services
- Phone and online support options (availability of 2nd level domestic support personnel)
- Issue resolution model and support hours of coverage (EST)
- Maximum number of allowable contacts
- Method of Communication (e.g., phone, e-mail)

Market Presence

- Comparisons with competitor's products on the market
- Vendor's place/position in the market
- Vendor's relationship with respective software OEM and respective tier (e.g. Bronze, Silver, Gold), if applicable
- Any information the vendor would like to present to the University

Office of the Executive Vice President for
Administration and Chief Financial Officer

Procurement Services

3 DISCOVERY DRIVE, UNIT 6076

STORRS, CT 06269-6076

PHONE 860.486.2619

FAX 860.486.5051

www.procurement.uconn.edu

Partnerships

- Testimonials from other Universities for whom you have provided similar services

Response Instructions:

Submittal:

- 1. Due Date: 06/01/2016 at 2:00 PM (EDT).**
2. Please submit one (1) original and one (1) electronic original on a CD, DVD, or USB drive
3. Please direct all questions and submit correspondence to:

University of Connecticut
Procurement Services
ATTN: Kristin Allen
3 Discovery Drive, Unit 6076
Storrs, CT 06269-6076

Phone: 860-486-0970
Email: kristin.allen@uconn.edu

Office of the Executive Vice President for
Administration and Chief Financial Officer

Procurement Services

3 DISCOVERY DRIVE, UNIT 6076
STORRS, CT 06269-6076
PHONE 860.486.2619
FAX 860.486.5051
www.procurement.uconn.edu