

Administered by University of Maine System Office of Strategic Procurement Request for Qualifications (RFQ)

SUBMISSION FORM PACKAGE

ALTERNATIVE PRIVATE EDUCATIONAL LOANS

RFQ # 2025-062

**Issued Date:** February 14, 2025

**Response Deadline Date/Time:** March 25, 2025 11:59 P.M. EST

## Response Submission Information:

Submitted electronically to [UMSResponses@maine.edu](mailto:UMSResponses@maine.edu)

Email Subject Line – GNA: Alternative Education Loans- RFQ #2025-062

## Response Contact Information:

Email: [UMSResponses@maine.edu](mailto:UMSResponses@maine.edu)

# RESPONSE FORMAT REQUIREMENTS

## Response Format Instructions

This section contains instructions for Respondents to use in preparing their response. The Respondent’s submission must follow the outline used below, including the numbering of section and sub-section headings. Failure to use the outline specified in this section or to respond to all questions and instructions throughout this document may result in the response being disqualified as non-responsive or receiving a reduced score.

The University and its evaluation team for this document have sole discretion to determine whether a variance from the document specifications should result in either disqualification or reduction in scoring of a response.The University seeks detailed yet succinct responses that demonstrate the Respondent’s experience and ability to perform the requirements specified throughout this document.

### Section 1 - Response Cover Page

* + - 1. Insert Appendix A – University of Maine System Response Cover Page
      2. Insert Appendix B – Debarment, Performance and Non-Collusion Certification

### Section 2 – Lender Response Sheet (on-line Excel Attachment)

* + - 1. Insert Attachment A

### Section 3 Response to Questions

* + - 1. Insert Appendix C – Organization Reference Form
      2. Insert Appendix D – Evaluation Question(s)

## Appendix A – University of Maine System Response Cover Page

##### RFQ # 2025-062

Alternative Private Educational Loans

|  |  |
| --- | --- |
| Organization Name: |  |
| Chief Executive –  Name/Title: |  |
| Telephone: |  |
| Fax: |  |
| Email: |  |
| Headquarters Street  Address: |  |
| Headquarters City/State/Zip: |  |
| Lead Point of Contact for Quote – Name/Title: |  |
| Telephone: |  |
| Fax: |  |
| Email: |  |
| Street Address: |  |
| City/State/Zip: |  |

1. No personnel currently employed by the University or any other University agency participated, either directly or indirectly, in any activities relating to the preparation of the Respondent’s response.
2. No attempt has been made or will be made by the Respondent to induce any other person or firm to submit or not to submit a response.
3. The undersigned is authorized to enter into contractual obligations on behalf of the above-named organization.
   1. By submitting a response to a Request for Proposal, bid or other offer to do business with the University your entity understands and agrees that:;
   2. Your entity agrees that the resulting Agreement will be the entire agreement between the University (including University’s employees and other End Users) and Respondent and in the event that the Respondent requires terms of use agreements or other agreements, policies or understanding, whether on an order form, invoice, website, electronic, click-through, verbal or in writing, with University’s employees or other End Users, such agreements shall be null, void and without effect, and the terms of the Agreement shall apply.
   3. Your entity will identify at the time of submission which, if any, portion or your submitted materials are entitled to ''trade secret" exemption from disclosure under Maine's Freedom of Access Act; that failure to so identify will authorize UMS to conclude that no portions are so exempt; and that your entity will defend, indemnify and hold harmless UMS in any and all legal actions that seek to compel UMS to disclose under Maine's Freedom of Access Act some or all of your submitted materials and/or contract, if any, executed between UMS and your entity.

To the best of my knowledge all information provided in the enclosed response, both programmatic and financial, is complete and accurate at the time of submission.

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name and Title (Printed) Authorized Signature

**Appendix B – Debarment, Performance and Non-Collusion Certification**

**University of Maine System DEBARMENT, PERFORMANCE and NON-COLLUSION**

**CERTIFICATION**

##### RFQ # 2025-062

Alternative Private Educational Loans

By signing this document, I certify to the best of my knowledge and belief that the aforementioned organization, its principals and any subcontractors named in this proposal:

1. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.
2. Have not within three years of submitting the proposal for this contract been convicted of or had a civil judgment rendered against them for:
   1. Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state or local government transaction or contract.
   2. Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
   3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
   4. Have not within a three (3) year period preceding this proposal had one or more federal, state or local government transactions terminated for cause or default.
3. Have not entered into a prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services and this proposal is in all respects fair and without collusion or fraud. The above mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.

Failure to provide this certification may result in the disqualification of the Respondent’s proposal, at the University’s discretion.

Date:

Name and Title (Printed) Authorized Signature

## Attachment A- Lender Response Sheet (Available in Excel at: https://[www.maine.edu/strategic-procurement/upcoming-bids/](http://www.maine.edu/strategic-procurement/upcoming-bids/)

**RFQ Evaluation Form (for illustrative purposes- to be scored by UMS)**

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | Average wait time for calls (minutes) |  | 0 |
| 2 | Do you provide borrowers with online help via email or chat? |  | 0 |
| 3 | Can borrowers fully access their account online? |  | 0 |
| 4 | Do you accept payments online? |  | 0 |
| 5 | Do you provide loan calculators? |  | 0 |
| 6 | Is there an option to e-sign a promissory note? |  | 0 |
| 7 | Do you use third party processing systems? |  | 0 |
| 8 | Do you participate in EFT? |  | 0 |
| 9 | Do you participate in electronic loan processing, disbursements,  and refunds? |  | 0 |
| 10 | If yes, disbursements, refunds, or both? |  | 0 |
| 11 | Provide the current  approval/denial percentages for UMS families |  | 0 |
| 12 | Eligible borrower - student |  | 0 |
| 13 | Eligible borrower - parent |  | 0 |
| 14 | Origination fee |  | 0 |
| 15 | Guarantee fee |  | 0 |
| 16 | Other fees |  | 0 |
| 17 | Is there a loan application fee? |  | 3 |
| 18 | Interest rate with co-borrower |  | 0 |
| 19 | Interest rate without co-borrower |  | 0 |
| 20 | Deferment option available? |  | 0 |
| 21 | Interest only options |  | 0 |
| 22 | Minimum monthly payment |  | 0 |
| 23 | Co-signer release option |  | 0 |

|  |  |
| --- | --- |
| **Total Points for Lender** | 0 |

**Appendix C – Organization Reference Form**

**Respondent’s Organization Name:**

**INSTRUCTIONS**: Provide a minimum of three (3) current professional references who may be contacted for verification of the Respondent’s professional qualifications to meet the requirements set forth herein. We strongly prefer references from higher education institutions similar in size and requirements to the University of Maine System, including those with multi-campus integrated solutions.

We request that the references include one long-standing customer (minimum of 3 year engagement) and one new customer (one who has been engaged with Respondent for less than one year).

|  |  |
| --- | --- |
| **REFERENCE #1** | |
| Institution/Company Name |  |
| Contact Name |  |
| Contact Title |  |
| Contact Phone Number |  |
| Contact eMail Address |  |
| Relationship Length |  |

|  |  |
| --- | --- |
| **REFERENCE #2** | |
| Institution/Company Name |  |
| Contact Name |  |
| Contact Title |  |
| Contact Phone Number |  |
| Contact eMail Address |  |
| Relationship Length |  |

|  |  |
| --- | --- |
| **REFERENCE #3** | |
| Institution/Company Name |  |
| Contact Name |  |
| Contact Title |  |
| Contact Phone Number |  |
| Contact eMail Address |  |
| Relationship Length |  |

|  |  |
| --- | --- |
| **REFERENCE #4** | |
| Institution/Company Name |  |
| Contact Name |  |
| Contact Title |  |
| Contact Phone Number |  |
| Contact eMail Address |  |
| Relationship Length |  |

## Appendix D – Evaluation Question(s) - Organization, Qualifications and Experience

##### Respondent’s Organization Name:

**INSTRUCTIONS**: Respondents shall ensure that all information required herein is submitted with the response. All information provided should be verifiable by documentation requested by the University. Failure to provide all information, inaccuracy or misstatement may be sufficient cause for rejection of the response or rescission of an award. Respondents are encouraged to provide any additional information describing operational abilities.

Evaluation Question(s)

1. Provide a statement describing your company to include name, number of employees, locations, number of years in business, number of years offering/supporting the proposed solution, and any and all acquisitions or mergers in the last five years. Is the company publicly or privately held?
2. If subcontractors are to be used, provide a list that specifies the name, address, phone number, contact person, and a brief description of the subcontractors’ organizational capacity and qualifications.
3. Please provide information about contract cancellations or non-renewals your company has experienced over the last three years.
4. Describe your experience offering a solution for the business requirements identified in this document within higher education. Provide a client list that includes any and all higher education clients.
5. Provide a statement that explains why your company would be most qualified to provide products and services to the University of Maine System and Maine Community College System. What differentiates you from your competitors? In the response the Respondent must demonstrate that they are a recognized leader in the services and/or products covered in this document.
6. Financial Stability

No financial statements are required to be submitted with your responses, however, prior to an award the University may request audited financial statements from your company, credit reports and letters from your bank and suppliers.