



# THE UNIVERSITY OF THE WEST INDIES

## OPEN CAMPUS

### HUMAN RESOURCE DEPARTMENT

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September 18, 2017

## LETTER OF INVITATION

Consulting Services for  
**Provision of Customer Service Training**

Dear Sir/Madam:

The UWI Open Campus (UWIOC) in partnership with Global Affairs Canada (G.A.C.) as part of an initiative entitled “Strengthening Distance Education in the Caribbean” intends to source skilled facilitators to provide training to strengthen the long term capacity of the institution. The UWIOC is therefore pleased to invite you or your firm to submit proposals for the above captioned assignment.

Proposals should follow the format given in the accompanying **Supplementary Information** document. Also note that we have enclosed within the **Request for Proposal** document, the Terms of Reference required and the Operational Plan under which expected services would be performed.

Your proposal should be sent **on or before**  
**Friday, October 6, 2017 at 5:00 p.m. Eastern Caribbean Time.**

It should contain signed copies each of the proposal and a signed letter of transmittal agreeing to the terms of selection.

In order to obtain further detailed information on the assignment and the regional conditions you or your firm are advised to send an e-mail to the Office of the Director of Human Resources before submitting your proposal to:

Mr. Eric Innocent Baron  
Director of Human Resources  
The University of the West Indies  
Open Campus  
Gordon Street  
St. Augustine  
Trinidad & Tobago

E-mail: [human.resoruces@open.uwi.edu](mailto:human.resoruces@open.uwi.edu)

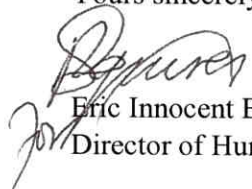
Please note the successful firm/individual must be able to conduct the training in an online environment using modalities/techniques such as Blackboard Collaborate (BBC) or Zoom.

It would be appreciated if you would inform the Director of Human Resources, Mr. Eric Innocent Baron via email: [human.resoruces@open.uwi.edu](mailto:human.resoruces@open.uwi.edu) as soon as you or your firm receive this invitation:

- i. whether you will be submitting a proposal;
- ii. whether you intend to associate with a firm and its name; and
- iii. the date you intend to submit your proposal.

Responses to (i), (ii) and (iii) may be delivered separately.

Yours sincerely



Eric Innocent Baron (Mr.)  
Director of Human Resources



THE UNIVERSITY  
OF THE  
WEST INDIES

REQUEST FOR PROPOSALS  
FOR THE DELIVERY OF HUMAN RESOURCE TRAINING  
IN  
CUSTOMER SERVICE EXCELLENCE  
TO THE OPEN CAMPUS

UWIOC/GAC

18<sup>th</sup> September 2017



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## **1. General Conditions**

- a. This RFP is not a contract offer.
- b. Receipt of a proposal neither commits UWI Open Campus / Global Affairs Canada (UWIOC/GAC) to award a contract to any vendor, nor limits our rights to negotiate in our best interest.
- c. UWIOC/GAC reserves the right to contract with a vendor for reasons other than price.
- d. Failure to answer any questions in this RFP may subject the proposal to disqualification.
- e. UWIOC/GAC reserves the right to request additional information that is necessary and pertinent to the project or to assure the vendor's adequate competence to perform according to bid specifications.
- f. Products and services which are not specifically requested in the RFP but which are necessary to provide the functional capabilities proposed by the vendor shall be included in the proposal.
- g. Prices are to be quoted in (US\$) – VAT Exclusive.
- h. The final prices quoted shall include: the price delivered to site, as specified in the contract pricing forms, inclusive of any handling charges, and any other incidental charges.

### **1.1 Cost of Proposals**

Expenses incurred in the preparation of proposals in response to this RFP are the sole responsibility of the vendor.

### **1.2 Right of Rejection**

UWIOC/GAC reserves the right to accept or reject any and all proposals, or any part of any proposal, without penalty. UWIOC/GAC may award a contract to a single contractor for all elements for the entire project or may award any of the elements separately. In addition, UWIOC/GAC reserves the right to fund (and proceed with project or purchase), not to fund the project, or to partially fund the project. Any allowance for oversight, omission, error, or mistake by the bidder made after receipt of the proposal will be at the sole discretion of UWIOC/GAC.

## **2. Introduction**

### **2.1 Purpose of RFP**

UWIOC/GAC is seeking the services from qualified vendors to supply and deliver Human Resource Training to its Open Campus staff in Customer Service Excellence.

This RFP provides the requirements and evaluative criteria and requests detailed responses from all prospective vendors, including pricing and service descriptions, in a specified format. UWIOC/GAC will conduct a review of the responses received from this RFP.

### **2.2 Background Information**

#### **2.2.1 About the UWIOC**

The University of the West Indies, Open Campus (UWIOC) is the newest campus of the 69-year-old University of the West Indies (The UWI). UWIOC was formally launched in Antigua & Barbuda in June 2008.

The UWIOC is an amalgamation of the previous Office of the Board for Non-Campus Countries & Distance Education (BNNCDE), the School of Continuing Studies (SCS), the UWI Distance Education Centre (UWIDEC), and the Tertiary Level Institutions Unit (TLIU).

The UWIOC offers multi-mode teaching and learning services across the Caribbean region. There are currently almost 50 UWIOC locations, including sites and offices in 16 countries, servicing 17 countries in the English-speaking Caribbean with a staff complement of just over five hundred persons.

The UWIOC has developed a unique approach to enhancing the student experience through innovative undergraduate, postgraduate and continuing/professional study programmes and courses by distance, blended, online and face-to-face learning modes in the Caribbean region.

#### **2.2.2 Project funding by GAC**

On March 27, 2013 the Global Affairs Canada (GAC), formerly Department of Foreign Affairs and Trade Development (DFATD) of Canada, and the UWIOC signed a contribution agreement for a project entitled “UWI Open Campus – Strengthening Distance Education in the Caribbean” (SDEC). This agreement will cover the period from March 27, 2013 to March 31, 2018.

Among other things, the project will create and implement new market-driven responsive Distance Education courses and programmes, and strengthen the long-term capacity of The UWI as an institution. The latter includes strengthening of both human resources and institutional infrastructure such as systems, processes and, to a very limited extent, physical facilities of the University in support of the new programmes.

Strengthening the organizational management of the Open Campus is one of the outcomes of the SDEC project, and the development of the Institutional Strengthening Plan is a result of this outcome, vis-à-vis the Technical Assistance & Training by Experts in: (1) Organisation Structure, (2) Results Management, (3) Quality Assurance, (4) Developing Public-Private Partnerships.

### **3. Project Description**

#### **3.1 Project Scope Overview**

UWIOC/GAC is soliciting proposals from experienced and highly qualified firms to provide and deliver training to the UWIOC staff members, approximately one hundred (100), in Customer Service Excellence, as part of its Institutional Strengthening Plan.

#### **3.2 Project Objectives**

The Institutional Strengthening Plan is intended to identify and address certain weaknesses/gaps inherent in the operations of the UWIOC, in relation to structure, and the ability of the employees to cope with stress in a fast changing environment, and should result in:

1. A cadre of trained, competent staff to deliver excellent professional and quality experiences to customers;
2. Augmenting a competitive advantage in the regional and global environment; and
3. Frontline staff providing excellence in service delivery.

#### **3.3 Project Audience**

The intention of the Customer Relations programme is to equip about one hundred (100) Administrative and Technical Services (ATS) staff with the useful knowledge, behaviours and skills to enable them to consistently and competently provide excellent professional and quality experiences to customers. ATS are usually the first encountered at the UWIOC and the service they deliver is critically important to the services offered by the institution. Therefore, the key to achieving and sustaining business success at the UWIOC is its ability to care for its customers. The UWIOC recognizes in order to survive in this increasingly competitive regional and global environment; it has to be more innovative and efficient. The OC can distinguish itself by providing excellence, one of its values, in service delivery. Training of ATS staff is envisioned to be a Customer Experience journey that has more impact than just an understanding of customer service to meet the needs of the UWIOC continually evolving and diverse environment.

#### **3.4 Project Outcomes**

The Provider will be expected to

- Train approximately one hundred (100) members of the Administrative and Technical Services Staff (ATSS) in Customer Service Excellence at a professional level to learn about delivering Customer Experience Management that enables the highest level of internal or external customer interaction; to help them improve



the customer-oriented environment at the Open Campus.

At the end of the training, the participants should be able to:

- Learn and acquire the necessary knowledge and competencies to provide enhanced professional and quality experiences to customers.
- Recognize the importance of service excellence as a key business differentiator that is critical for the service of Education at the UWI
- Make meaningful contributions to the development of the UWIOC business processes which enhance customer experience
- Discuss the difference between customer service and customer experience journey
- Apply learnt communication techniques in responding to customers professionally
- Explain how attitudes and behaviours affect service delivery
- Use service recovery response strategies to manage dissatisfied and difficult customers
- Manage customer expectations and complaints

#### 4. Calendar of Events

The following table summarizes the calendar of events.

Activity	Timeline
Distribute RFP	September 18 <sup>th</sup> , 2017
Deadline for submission of questions	September 25 <sup>th</sup> , 2017
Deadline for UWIOC response to questions	September 28 <sup>th</sup> , 2017
Deadline for receipt of proposals	October 6 <sup>th</sup> , 2017
Vendor short list presented	October 13 <sup>th</sup> , 2017
Approval and announcement of vendor selected	October 20 <sup>th</sup> , 2017

#### 5. Proposal Submissions

##### 5.1 General

The proposals shall be used to determine the prospective vendor's capability of rendering the services to be provided. Failure to fully comply with the instructions in this RFP may eliminate the vendor's proposal from further evaluation as determined at the sole discretion of UWIOC/GAC.

UWIOC/GAC reserves the right to evaluate the contents of proposals submitted in response to this RFP and to select a successful vendor, or none at all. UWIOC/GAC reserves the right to waive any requirements of this RFP when it determines that waiving a requirement is in the best interest of UWIOC/GAC. The proposal is to include contact

information, including principal contacts and officers, main and local business addresses, tax identification number, voice and fax phone numbers and email addresses. The prospective vendor must sign proposals. An unsigned proposal may be rejected.

## **5.2 Proposal Format**

All proposals should be typewritten; have consecutively numbered pages; including any exhibits, charts, or other attachments.

Proposals shall be organized into the following major sections:

### **5.2.1. Cover Letter**

The letter shall identify core team, provide name of contact person, phone number and fax number, summarize vendor's history and other completed projects most relevant to the RFP.

### **5.2.2. Company Background, Qualification and History**

The proposal shall

- a. Include evidence of the Provider's qualification in conducting similar exercises (including qualification of all consultants it intends to use for this specific assignment).
- b. Describe the experience of Provider including qualification of all consultants it intends to use for this specific assignment) in providing similar exercises and related professional services.
- c. Describe relevant sales and services carried out in the last three (3) years which illustrate the firm's experience as it relates to this RFP. Experience in delivery of training to educational institutions will be an advantage.

## **5.3 Technical Proposal**

### **5.3.1 Executive Summary**

The Executive Summary shall serve to familiarize UWIOC executives and evaluators with the key elements and unique features of the proposal by briefly describing how the vendor is going to accomplish the task. The Executive Summary shall contain the following:

- A summary of your approach to addressing the issues outlined in the RFP. Any material presented in this section shall not be considered as meeting any technical requirement.
- A master milestone schedule of all major efforts to be undertaken in the programme. Dates shall begin as listed in this RFP.
- A list of exceptions taken to this RFP and the reason for the exception.
- A list of high-risk areas that are reasons for concern such as schedule deadlines, technologies with which integration may be problematic, or overly tight specifications. Any request to delete, change, or relax a requirement must be fully supported in this section. Vendors will not be evaluated on this paragraph and

cannot lose evaluation points by listing areas of concern. These concerns will be addressed with the successful vendor during negotiation.

### 5.3.2 Technical Section

The technical proposal shall consist of descriptions of the vendor's capacity to meet the functional requirements outlined in the RFP. This RFP was designed to facilitate the vendors' responses to the requirements and to provide the Evaluation Committee with a standard method for comparing vendors' responses. Vendors are encouraged to describe how their solution meets the requirements and pilot projects presented, without references to manuals, data sheets, product brochures, or other supporting material. When necessary, vendors may support answers by reference to other material, but answers should be understandable without reading the other material. Answers such as "See Appendix A, Technical Manual" will be marked as non-responsive. Any supporting material cited in an answer must be referenced by appendix, name of document, and page(s) to be reviewed.

### 5.3.3 Management Section

In this section, the vendor shall provide information organized into the following sections:

#### 5.3.3.1 Education and Training

Vendors shall provide a detailed description of all proposed education and training recommended for this project. This section shall have an introductory section that justifies the training programmes described, the basic approach taken, and the benefits for UWIOC.

Vendors shall also list recommended training options and UWIOC personnel<sup>1</sup> who should participate. This list shall also contain a description of training content, typical delivery methods, student-instructor ratio, and instructor's qualifications. Vendors shall provide pricing information in the pricing section.

UWIOC is looking for live interactive training with instructors providing a greater percentage of the actual training. Vendors shall discuss their ability to produce unique classes for this project if so warranted. Pricing estimates for typical customized classes shall be provided in the pricing section.

Vendors shall provide one sample training handbook for evaluation. This handbook shall be placed in an appendix to the proposal and marked as such.

#### **Key Highlights include:**

- Describe the training that is available to UWIOC's personnel and if it is available on site.
- Do you provide a train-the-trainer technique within your training offerings?

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<sup>1</sup> This might include power users, technical staff, management, etc. based on the content of the training.

- Do you provide web-enabled training courses and tutorials? If yes, what are the fees associated with these courses?
- Do you offer a full array of live interactive training (including solution certification) via the internet, which can minimize the end user's need for travel and additional travel-related expenses for training?
- Describe the subscription-based training services that may be available to provide UWIOC with on-demand, online training for one price.
- Describe available documentation for end users in paper and electronic format?
- Are annual user group meetings held?

#### 5.3.3.2 Vendor Profile

Vendors shall provide a brief description of the overall organization of their company including headquarters organization, divisions, and operations. This description shall include how long the company has been in operation and if it is owned by a parent company or if it owns other companies as a parent company. Vendor should supply, as an appendix, a current annual report and other information that is pertinent to establish the financial stability of the company. Vendor shall supply as an appendix the CVs of the Professional staff assigned to this project, each CV must be signed by the staff member him/herself.

Vendors shall include how many organizations have implemented their solution overall. Include a description of the industries you service, how many organizations have implemented your solution in the past fiscal year and how many customers were added in the past three (3) fiscal years.

Vendors shall provide a minimum of three related contracts awarded within the last three years. The vendor shall provide a synopsis of each contract and discuss its relevancy to this project and proposal.

The referenced contract must include the following information:

- Organization Name
- Customer Contact – name, title and contact information
- Address
- Date of work performed
- Brief description of work performed
- Project dollar value

In addition, vendor shall provide permission from at least two of the above references for follow up by UWIOC personnel. Vendors shall provide a realistic discussion of the success in achieving technical, management, and budget for one of the above references.

#### 5.3.3.3 Appendices

Any material, such as sales brochures, CDs, and other reference material, shall be placed in an Appendix to the proposal. Appendices shall be identified by letter: Appendix A, Appendix B, etc. Material in an appendix shall have been referenced in your proposal.

### 5.4 Format of Pricing Proposal

#### 5.4.1 Executive Summary

A discussion of your cost proposal, which should contain, but not be limited by, the following:

- How pricing was computed for software and related services

- Projected life cycle cost of equipment/programme
- Projected return on investment (ROI)
- Projected yearly incremental costs
- Hidden or related costs that UWIOC has not anticipated

#### **5.4.2 Pricing Section**

The pricing proposal shall consist of the following sections:

#### **5.4.3 Professional Services**

- The vendor shall present the total cost of all professional services including a high level breakdown of resource allocation to each major project activity.

#### **5.4.4 Hardware and Ancillary**

- The vendor shall describe all hardware and ancillary devices required to meet the defined scenarios for the solution and provide any other information that supports the implementation plan.

#### **5.4.5 Appendices**

Any material, such as pricelists, CDs, and other reference material, shall be placed in an Appendix to the proposal. Appendices shall be identified by letter: Appendix A, Appendix B, etc. Material in an appendix shall have been referenced in your proposal.

### **6. Exceptions to the RFP**

Any variance to the requested technical specifications or proposal must be explained under this section.

### **7. Required Attachments**

- a. Statement of vendor's qualifications
- b. Customer references

### **8. Evaluation Process**

Selection of the successful proposal shall be generally based on the information provided by the Vendor/supplier in response to the RFP and any subsequent interviews that may be conducted. Vendor/supplier interviews will be held solely at the option and discretion of UWIOC/GAC.

The process for selection shall occur in the following sequence

- Review and evaluate proposals
- Establish a "short list" of qualified firms
- Interview/investigate "short-listed" firms
- Identify the best qualified firm
- Contract negotiations
- Award contract

### 8.1 Evaluation Criteria

UWIOC/GAC evaluates and weighs the follow criteria when evaluating vendor's responses. These standards are listed in descending order of importance.

<b>Evaluation</b>	<b>Criteria Weight</b>
Cost	25%
Design and technical specifications	40%
Implementation methodology	15%
References, experience and capabilities of vendor	20%

## Appendix A: Statement of Vendor Qualification

1. Legal Business Name: \_\_\_\_\_
  2. DBA (Doing Business As) Name, if applicable: \_\_\_\_\_
  3. Business Office Address:
    - a. Street: \_\_\_\_\_
    - b. City, State, Zip: \_\_\_\_\_
    - c. Country: \_\_\_\_\_
    - d. Telephone Number: \_\_\_\_\_
    - e. Fax Number: \_\_\_\_\_
    - f. Email: \_\_\_\_\_
    - g. URL: \_\_\_\_\_
  4. Business Effective Date: \_\_\_\_\_
  5. Organized Business Status:  
\_\_\_\_\_ Corporation \_\_\_\_\_ Partnership  
\_\_\_\_\_ Individual/Sole proprietor \_\_\_\_\_ Other
  6. How many years have you been engaged in the business under your present name?  
\_\_\_\_\_
  7. What other names(s) if any has your business/company operated under and taxpayer number used?  
\_\_\_\_\_  
\_\_\_\_\_
  8. Please list the names of your personnel authorized to sign legal and binding Bid Documents.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  9. Please attach to this statement at least three references, including: name, address, title, telephone number and brief description of work performed, including dates of work.  
The above statements must be subscribed and sworn before a Notary Public.
- Authorized Representative**  
Signature \_\_\_\_\_  
Date \_\_\_\_\_  
Name \_\_\_\_\_  
Title \_\_\_\_\_  
Email Address \_\_\_\_\_  
Telephone Number \_\_\_\_\_  
Fax Number \_\_\_\_\_  
\_\_\_\_\_  
(Notary Public)

## Appendix B: Format of Training Solution

### Content of Training

During the training the following ideas, concepts and issues should be discussed and presented:

- How customers drive business processes and they must be designed to add value to customer's experience.
- Why effective customer management requires a combination of the correct attitude and skills e.g. Listening and Empathy.
- The staff member's role and behavior as a "face" for the OC and need to adopt a consistent, professional style when dealing with customers.
- The importance of thinking about the quality of customer service and particularly the customer experience journey, and how the UWI culture affects the service experience.
- The roles and responsibilities of supervisors, Heads and Directors and Principal so called "watchdogs."
- How UWIOC seek to differentiate itself by providing excellence in service delivery through adopting a "culture of service;" and how the online environment facilitates management of customer experience.
- The importance of service recovery and its impact on the UWI business
- The relationships between employees' actions and behaviours and how these impact corporate image, customer perception and profitability
- The different views on whether "the customer is always right" and whether a customer is seen as a problem to be solved or a business opportunity to be exploited.
- The importance of customer loyalty and lifetime value.

### Mode and Timing of Delivery of Training

- It is expected that the assignment will require a minimum of **four (4) days** consisting of total of a maximum **twelve (12) hours**.
- A group consisting of no less than **25** individuals will participate in each of **four (4) sessions for a 4-day period** of training
- Each day will be for a 3-hour session and will be conducted by a **face-to-face, online and or blended** mode on **a date specified**.
- Training will continue through **face-to-face, online and/or blended modality** as specified in the contract. Therefore, each session will be of duration three (3) hours *in situ* and group activities.
- Training sessions to begin on **Monday, October 2, 2017** and end in the week ending **Friday, December 8, 2017**