

1. Purpose of the RFI

The University of California San Diego (“UC San Diego”) is seeking information from qualified vendors to provide a virtual agent solution that can help support the needs of multiple departments and our diverse clientele, including external clients, vendors, visiting scholars, students, staff, and more. The goal of this initiative is to provide excellent customer service and reduce total case volume by leveraging a virtual agent that can pull information from our commonly used systems, such as Oracle, PaymentWorks, and Concur.

UC San Diego invites you to review this RFI and respond to the questions listed under the “Response Requirements” section of this document. We expect to receive your full response via CalUsource (UC’s electronic bid website) by the deadline indicated under RFI Schedule section. Your responses will be instrumental in UC San Diego’s understanding of virtual agents that are available in the current marketplace.

For the respondents who appear to meet UC San Diego’s needs and who are determined responsible, the UC San Diego evaluation team may decide to gather additional information and invite the suppliers to participate in an in-person or webinar presentations, and product proof of concept. This invitation is not guaranteed and subject to change.

This RFI is a mechanism for gathering information and does not constitute a binding procurement process, however, purchases of goods and/or services may result from information obtained through the RFI process, where deemed appropriate. Please note that UC San Diego is not obligated to make an award or issue an RFP as part of this process. In addition, UC San Diego, in its sole discretion, may decide to engage in direct question and answer sessions with one or more agencies and may decide to enter into an agreement based upon those discussions/interviews and resulting proposal.

The ideal supplier/system/service should meet the following:

Requirements

API Capabilities:

The virtual agent solution must have the ability to integrate with our existing systems, including Oracle, PaymentWorks, and Concur (can provide a more comprehensive list at a later time) to retrieve status updates and provide accurate information to our clients.

Supply Chain Management:

The virtual agent should have knowledge and understanding of supply chain management principles and practices, particularly in the context of higher education institutions.

Multilingual Assistance:

The virtual agent must be able to provide assistance in multiple languages to cater to our diverse clientele.

Seamless Transitions:

The virtual agent should be able to collect information and provide smooth transitions to human agents, if necessary, to ensure efficient and effective service. (Integrations with ServiceNow and Zendesk would also be preferred)

Texting Capabilities:

The virtual agent should support texting capabilities for mass and small group notifications, specifically tailored to the needs of UC San Diego

CRM Integration and Content Scraping:

The virtual agent must prioritize accuracy and reliability, with seamless CRM integration. It should also have the ability to scrape content from Knowledge Base Articles and adapt to UC San Diego's specific content needs.

Ease of Use and Mobile Capability:

The virtual agent should be easy to use, with flexible update capabilities and mobile compatibility. Multilingual support should be integrated into these features.

Desired Outcomes

Improved Customer Service:

The virtual agent solution should provide accurate and timely information to our clients, reducing the need for human intervention and improving overall customer satisfaction.

Reduced Case Volume:

By providing easy access to status updates and other information, the virtual agent solution should help reduce the total case volume and alleviate the workload of our human agents.

Optimized Workflows:

The virtual agent solution should help optimize our workflows, reducing the time and resources required to address routine inquiries and freeing up staff to focus on more complex and high-value tasks.

Enhanced Student Support and Retention:

The virtual agent solution should play a crucial role in supporting student success and retention, especially through bilingual capabilities that assist a diverse student population. This includes providing essential support to students, parents, and guardians.

Streamlined Information Access:

The virtual agent should serve as a key interface for delivering information about study abroad programs to students, families, and international partners, enhancing accessibility and engagement.

2. Background

UC San Diego is a higher education institution that strives for innovation and excellence. Our campus community relies on various systems and tools to manage daily operations, including procurement, invoicing, and payment processing. However, we receive a high volume of inquiries related to status updates, which can be time-consuming and resource-intensive to address. We believe that a virtual agent solution can help optimize our workflows, reduce case volume, and improve overall customer satisfaction.

3. RFI Timeline, Point of Contact, and Attachments

Schedule of Events

Anticipated Action	Anticipated Date
Electronic RFI Release	Friday, August 30, 2024
Deadline for Suppliers Q&A via Discussion Forum	Wednesday, September 11, 2024 4PM PT
University's Response to Supplier Q&A by	Wednesday, September 18, 2024
RFI Response Deadline	Thursday, September 26, 2024 4PM PT

The University reserves the right to modify the above schedule of events and make changes to other provisions in this RFI. It is the Bidder's responsibility to read the entire document and any addendums, and to comply with all requirements listed herein.

Single Point of Contact

The University RFI Administrator is the sole point of contact regarding all procurement and contractual matters relating to the requirements described in this RFI; and is the only office authorized to change, modify, clarify, etc., the specifications, terms and conditions of this RFI and any agreement(s) awarded as a result of this RFI. All questions and requests for clarification concerning this RFI should be entered into the CalUsource Discussion Forum by the questions deadline indicated in the Schedule of Events.

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University of California San Diego

Attachments

In addition to this document, the following attachments posted under the Guidelines and Attachments in CalUsource contain the requirements, terms, and conditions for this RFI:

- UC Terms and Conditions
- UC Required Supplier Information
- Attachment A - Cost Proposal Form

4. Response Requirements

Below is an outline of the critical elements associated with a virtual agent solution. Please provide responses to the following sections and upload the attachment under the Questionnaire section in CalUsource when prompted:

Company Overview:

A brief overview of the vendor's company, including experience and expertise in virtual agent solutions.

Technical Capabilities:

A detailed description of the vendor's technical capabilities, including API integration and system compatibility with the following systems: Oracle, Concur, PaymentWorks, iDocs, Transcepta, ServiceNow.

Domain Expertise:

A description of the vendor's knowledge and understanding of supply chain management principles and practices in higher education institutions.

Multilingual Support:

A description of the vendor's multilingual support capabilities.

User Experience:

A description of the vendor's user experience design and development process.

Document Scraping:

A description of the vendor's document scraping capabilities and how they can be leveraged to create responses to clients.

Existing Libraries:

A description of the vendor's existing libraries and how they can be tailored to meet the needs of a higher education system.

Data Metrics and Analysis:

Vendors should provide information on their ability to track and report data metrics, such as: Who is using the live chat, who is not using the live chat, when the chat is being used, and what the most common questions received.

Advanced data export and analysis capabilities are required, with options for filtering and data manipulation to improve virtual agent performance.

Data Collection and Usage:

A comprehensive explanation of the data collected from users, including: How the data is used, whether the data is sold or shared with third parties, and what reports and data are shared back with UC San Diego, the frequency of these reports, and the extent to which the information is sourced from UC San Diego systems.

5. Communication Regarding this RFI

All communications, including any requests for clarification should be submitted via the Discussion Forum on this event within the CalUsource tool. With the exception of the designated contact as provided in this RFI document, suppliers are not permitted to communicate with UC staff regarding this solicitation.

Any changes, additions, or deletions to the RFI will be in the form of amendments electronically sent via the CalUsource tool. UC will not be responsible for failure of any prospective Supplier to receive such amendments. All amendments will become part of the RFI.

It is Supplier's responsibility to read the entire document, including any attachments, references and amendments, and to comply with all requirements listed herein. For instructions on how to submit your information in the CalUsource tool, refer to the Supplier Bidding Guide under the Guidelines section of the CalUsource tool. Please note the CalUsource tool currently does not permit UC to customize language for the RFI process. Please be advised that although the CalUsource tool uses "bid" language, this RFI is a Request for Information and not a Request for Proposal.

6. Response Submittal and Evaluation

UC reserves the right to withdraw this RFI at any time. All documents submitted to UC San Diego in response to this RFI will become the exclusive property of UC San Diego and will not be returned. All documents are subject to the California Public Records Act. Marking a document "confidential" or "proprietary" may not prevent its release.

Supplier is strongly encouraged to complete and submit its response in the CalUsource tool well before the RFI's closing date and time. Late responses may not be accepted after the RFI's closing date and time. Responses should follow the format specified in the RFI. The submission of a response confirms that it has been issued and reviewed by an individual authorized to respond on behalf of Supplier.

Supplier will bear all costs incurred in the preparation and submission of responses and related documentation, including Supplier presentations to UC San Diego.

Evaluation Criteria

Technical Capabilities:

The vendor's ability to integrate with our existing systems (listed below) and provide accurate and timely information.

- Oracle, Concur, PaymentWorks, iDocs, Transcepta

Domain Expertise:

The vendor's knowledge and understanding of supply chain management principles and practices in higher education institutions.

Multilingual Support:

The vendor's ability to provide multilingual assistance and support.

User Experience:

The vendor's ability to provide a user-friendly and intuitive interface for our clients.

Document Scraping:

The vendor's ability to scrape existing documents and create responses to clients using AI tools like spiders and LLMs.

Existing Libraries:

The vendor's provision of existing libraries that coincide with the needs of a higher education system.

Timeline

The deadline for submission is SP2025. We anticipate evaluating responses and scheduling demonstrations with selected vendors in FALL2025.