

Friday, July 25, 2014

To Whom It May Concern:

This letter serves as a formal reference in regards to the consulting services provided to the University of Connecticut by Copier Audit Inc. in support of the University's managed print initiative.

The University commenced an RFI process in 2011 in an effort to gain information in pursuit of a managed print program. As subsequent Request for Qualifications and Request for Proposal were issued, the University's ability to proceed was hindered by a lack of subject matter experts. With the constant involvement, support and expertise of both Copier Audit Inc., UConn was able to identify the challenges with which we were faced, outline a detailed scope for the managed print program, and compile a well written RFP inclusive of detailed equipment specifications and Scope of Work. It is my opinion that Copier Audit Inc. was primarily responsible for allowing the University to overcome the aforementioned challenges as well as provide their guidance and expertise through the provider selection process. Additionally, Copier Audit Inc. provided indispensable insight allowing the University to conduct efficient and effective contract negotiations by compiling detailed guidelines along with an operational model required for effective program administration. Moreover, Copier Audit Inc. role in developing a successful contract management model cannot be understated.

Independent of their industry expertise, the overall experience with Copier Audit was exemplary. Their responsiveness, availability and optimistic approach made working with them a pleasurable experience. There were often times where the University requested a meeting the night before, requiring our consultants to travel hours to attend, and was accommodated without hesitation.

Copier Audit's involvement has allowed the University to enjoy substantial cost savings. I am happy to discuss this in greater detail.

It is my opinion that the roll of Copier Audit Inc. in the overall success of the managed print initiative was indispensable. Without the expertise, guidance and effectiveness of our consultants, I suspect the effectiveness and success of the launch of our managed print program would have suffered, risking the overall success of the initiative.

Please feel free to reach out to me for any additional information or inquiries.

Sincerely,



Matthew Larson, MBA

Director of Procurement
University of Connecticut

**SEE the UCONN Managed Print Services White Paper
Following these three intro pages**

Copier Analytics is a dba of Copier Audit Inc.

**UCONN Saved a Recurring \$391,200 Annually
and \$1,956,000 Over a New 5 Year Contract**

Matthew Larson, MBA, UCONN Director of Procurement, had an unbiased and objective team of experts at his side to ensure that every benefit promised by the new contract was actually delivered and realized.

Even more importantly, the University of Connecticut gained considerable competitive advantage, replacing slow, inefficient, outdated technology with the latest, state-of-the-art systems.

Faculty, students, and the administrative personnel who support them are better informed, better connected, and better equipped to do their jobs.

Expert execution of our proven five-step process has saved our clients over \$100 MILLION and counting — why not YOU?

Instead of madly juggling your operational budgets and wondering where you can chop a little here and slash a little there... you can safely re-allocate hundreds of thousand or even millions of dollars in one fell swoop ...

Instead of laboring under inefficient financial management of your printing and copying infrastructure, you can centralize billings and gain crystal clarity on where the money is going and why...

Instead of being plagued by an expensive, wasteful (and sometimes dramatic) supply chain for consumable supplies... your toner, ink, maintenance, and repair can become a non-event, arriving automatically, and just-in-time ...

Instead of being plagued by outdated, unreliable and less-than-secure equipment that robs your organization of productivity and morale... you can be at the top of your industry's game.

I know from personal experience... and from the experience of the dozens of high-profile clients ... this is what awaits you, when you bring Copier Analytics' unique contingency-based consulting services to bear.

**NYU SAVED \$1.8 Million
Annually and \$9 Million
Over a New 5 Year Contract
(Reduced spend 40%)**

"...It's not often that a company exceeds expectations, which is why I wanted to personally thank you...

When we first met and you described the cost savings potential that you believed NYU would experience on its copy machines, I must say I was somewhat skeptical.

However, ...you took our annual spend for copy machines of \$4.5 million to \$2.7 million for a recurring \$1.8 million annual savings... This was a painless process that was a win-win for the users and the University...."

Sincerely,

Steven Donofrio,
Vice President for Administration
New York University

Our fee is based on a modest percentage of your actual ACHIEVED savings and not pie-in-the sky recommendations typically suggested by consultants.

PLUS, our fee includes the full implementation of all our recommendations. And we collect NO FEES until you've achieved actual dollar savings.

So here's what to do next ...

I have developed a **15-to-30-minute, NO-OBLIGATION Discovery Call**. A quick assessment of your Document Management and Copier/Printer environment, some discussion of the effective solutions and management strategies available, as well as a ballpark idea of the savings opportunities that may exist at your organization.

Look at what we can accomplish together in this fast-paced, value-packed session:

- **Print and Document Management Strategy** — What is the right strategy for you? How does the right strategy enhance Electronic Health Records (EHR), Enterprise Content Management (ECM), Enterprise Risk Management (ERM)... improve your employee printing habits... and significantly reduce your costs, security risks, and IT management tasks?
- **Print Monitoring Technology** — What is the right technology for you? Can the same software that secures enterprise print workflows be used for analytical purposes? How can monitoring your organization's printing habits and workflows allow you to cut costs and increase user productivity? And how will the analytics reveal the best path forward for implementing managed print services?
- **Significant Measurable Results and Reductions** — How much can you reduce Total Cost of Ownership (TCO)... total print volume... color printing... toner and ink costs... vastly improve utilization of centralized print shop assets, including equipment, labor, postage, and paper... and consolidate and optimize your print assets?
- **Managed Print Services** — Are they for you? How much could you save? How much of the vendor hype should you believe?
- **Service Level Agreements** — What is the right SLA management strategy for you? How much could you save? How do you ensure SLA compliance?
- **Security Risks** — What is the best way to ensure device security protocols and to maximize HIPAA compliance?
- **RFP coming up?** — As you can see, we've helped many large and small enterprises, including universities and colleges, to construct and deliver RFP's, negotiate, and deploy contract renewals, upgrades and wholesale technology migrations. I'll give you my unbiased and objective opinion on the structure of your upcoming evaluation.
- **Savings Score Card and Plan** — How are you doing relative to competing higher Ed... and what's the one best step you can take right now to drive costs

out of your supply chain?

- **Complimentary TCO Analysis and Report** — Here's where you may request your Zero-Cost and No-Obligation COMPLIMENTARY Total Cost of Ownership Analysis and TCO Report— To determine security vulnerabilities and all components of your Document Management and Printing & Copying expenditure. Working offsite we will devote our full resources doing all the work necessary. You will receive a no-cost, no-obligation report identifying your current true TCO and how much you can save.

There is no charge for this call, but you must fill out a short questionnaire which we will review carefully before the session.

Step 1— [Click here and book a call](#) on my schedule.

Step 2— Fill out the mandatory questionnaire on the very next page.

Step 3— Watch your email for confirmation of the call.

Rest assured this consultation is not a thinly disguised sales presentation. It will consist of the best analysis and advice I can provide in a 15-to-30-minute timeframe.



Copier & Printer Management Consultants

**Jan Debassac
Chief Executive Officer**

Office: (888) 652-6743

Direct: (646) 669-3178

Email: JanDebassac@CopierAnalytics.com

Website: www.CopierAnalytics.com



Reducing the cost of doing business.

**SEE BELOW FOR:
UCONN Managed Print Services White Paper**

MANAGED PRINT SERVICES AT THE UNIVERSITY OF CONNECTICUT

Procurement Services:

Matthew Larson, Director of Procurement

Joseph Lastrina, Purchasing Agent I

BJ Pivonka, Strategic Sourcing Specialist

Executive Summary

Managed Print Services (“MPS”) is a service offered by an external service provider to optimize and manage a company's document output to meet certain objectives, such as driving down costs, improving efficiency and productivity, or reducing the IT support workload. The service provider takes primary responsibility for meeting the customer's office printing needs, including the printing equipment, the supplies, the service and the overall management of the printer fleet. The University commenced the MPS initiative with the following goals:

1. Drive cost efficiencies

The University will realize cost savings through a leveraged bundled purchasing power of its main campus at Storrs with its Regional campuses and UConn Health (“UCH”) driven to a consolidated supplier base, streamlined/standardized inventory fleet, improved document output practices and key printing practice data. Those are explained as follows:

a. Consolidated Supplier Base

Unifying all campuses’ (Storrs Main, Regionals and UCH) supplier base by identifying a common preferred vendor and consolidating volumes will drive higher discounts and financial incentives.

b. Streamlining and standardizing inventory fleet

Standardized of equipment by selecting fewer models will lower cost on maintenance and will drive better inventory controls in place. Additionally, the University will gain access to improved technology resulting in streamlined business processes through automated consumable monitoring (toner, staples, etc.) and remote technical support. This translates into key analytics to better manage the fleet of devices.

c. Awareness of environmentally conscious document output practices

To build awareness across University Community on executing improved document output practices such as duplex printing, multiple pages-up printing, and electronic document management, all facilitated by Energy Star-compliant equipment contributes to the environment while reduces expenses on materials (less paper, toner, etc.).

2. Improved Customer Service

By consolidating our supplier base, the University has the opportunity to become a top preferred client for the vendor, leading to better customer service while the university attains greater and faster service.

3. Strong partnership

Strategic partnerships result from solely working with a preferred industry leader. This allows the University to leverage the capabilities to gain access to innovation, technology trends, and increased responsiveness of the supply chain. Additionally, the University realizes additional opportunities to secure cost savings.

Recommendation

The Evaluation Committee, led by Procurement Services (“Procurement”) using the strategic sourcing process, has identified Connecticut Business Systems (“CBS”), a Xerox company with full access to Xerox technology, as the best suited Respondent. **CBS was selected for its highly flexible and “grass roots” program approach, resulting in the committee identifying CBS as the highest scored and ranked bidder.** Proceeding with CBS will allow Storrs and the five

regional campuses at Avery Point, Stamford, Torrington, Waterbury and West Hartford (“the Regionals”) to meet the above listed goals, all resulting in the ability to secure enterprise-wide cost savings and drive process efficiencies.

Currently UConn Health (“UCH”) has a fleet management contract with C-Tech and Xerox which has standardized their fleet, allowing for access to up-to-date analytics relative to spend and output volumes. UCH’s program is managed by the Reprographics department with a centralized billing and chargeback model. Approval of this recommendation will allow UCH to continue their standardized fleet practice while providing enhanced services, driving future efficiencies.

To ensure the success of the proposed initiative, one core requirement is to establish guidelines by which CBS will conduct its rightsizing assessments.

Key Data Points

- **Term:** The initial term of the contract resulting from this RFP will be for five (5) years with one (1) optional five-year and one (1) optional one-year extension possible, for a total potential term of eleven (11) years.
- **Payment Terms:** Payment terms for this initiative are 2% 15 days, net 45 days.
- **Annual Historical Spend for Multi-function Devices (“MFDs”) and photocopiers for FY’13 (7/1/12 – 6/30/13)*:**

Main campus at Storrs	\$ 632,480
UCH in Farmington	\$ 579,384
Total Spend FY’13	\$1,211,864

*Spend is related only to photocopiers and MFDs.

- **Potential Cost Savings – Storrs and the Regionals:** Based on CBS’s five-year attrition model for a fully deployed MPS program outlined in the Table 1 below, the estimated monthly savings are as follows:

<u>Upgrade by Year</u>	<u>Estimated Monthly Savings</u>	<u>Estimated Annual Savings</u>	<u>Estimated Savings (%)**</u>	<u>Compound Savings (5 yrs.)</u>
Year 1	\$ 16,903	202,836	48%	\$ 1,014,175
Year 2	\$ 4,841	58,092	46%	\$ 232,365
Year 3	\$ 1,509	18,108	50%	\$ 54,320
Year 4	\$ 3,164	37,968	50%	\$ 75,940
Year 5	\$ 2,072	24,864	41%	\$ 24,864
Total	\$ 28,489		Total	\$ 1,401,664

** Year one savings will be contingent on the adoption rate of the Storrs and Regional campuses, quantified by the total number of devices replaced with vendor placed devices. Savings based on machines replaced by year, pricing for previous machines was assumed to be from the current state contract. Modeling based on 59% fleet conversion rate for year 1.

Based on a like-for-like replacement of MFDs at UCH, the below tables summarizes the estimated monthly savings:

Projected CBS UCH Monthly Spend	\$15,678
Projected CBS UCH Monthly Savings	\$32,604
Projected CBS UCH Annual Savings	\$391248

- **Primary Users:** Primary users will be academic, administrative and operational personnel at Storrs and the Regionals, while at UCH it is expected that all staff will begin using this program at implementation.
- **Commitment:** The University has not made any annual spend volume commitments for this contract.
- **Competition:** Eight (8) potential suppliers responded to the Request for Qualifications (“RFQ”), which resulted in five (5) potential suppliers being selected to submit a response to the RFP. Four (4) of the five (5) suppliers submitted a proposal. The selected finalists were Xerox and CBS, where CBS is recommended by the committee.
- **Implementation Plan/Strategy:** The CBS approach is based on gaining acceptance through strong customer service, targeting specific departmental needs and maintaining momentum beyond day one implementation. Post-award, CBS will perform a full analysis of the University printers. As part of the evaluation, CBS intends to develop feedback from key stakeholders from University departments and colleges to determine how to best fill its needs on a departmental level. Planning and design will be focused on industry best practices as well as taking special accommodation requirements into account. A significant facet of this process is the attrition of machines the University has utilized for five (5) years or longer into new Xerox devices. For year one, CBS is projecting 59% of the Storrs and Regional fleet to be upgraded. For years 2 through 5, the expected percentage of fleet upgraded are 15%, 5%, 13% and 8% respectively. All annual numbers are determined on the number of devices that surpass five years of use within that year. After planning, the devices will be installed. In addition the CBS 360 system will be installed on UConn print servers; this software tracks the number of prints and levels of consumables.
- **Potential Implementation Issues:** The CBS implementation plan is feasible although aggressive in regard to the number of devices that will be replaced in year one. Many of the machines have been purchased by departments who may be unwilling to replace a machine at this time.
- **Administration of MPS Process:** The MPS initiative will be sponsored by Bill Wendt and collaboratively managed by Lori Nye in the **Document Production Center (“DPC”)**, in conjunction with UITs and key stakeholders. DPC will be responsible for overseeing the centralized billing model with either a departmental or individual chargeback. Additionally,

CBS will be providing the University with a program manager as well as two on-site technicians.

- **Pricing Model:** The MPS program will have two (2) specific costs per copy (“CPC”), one for black & white and another for color prints, billed per page of output (meaning no base equipment costs or monthly quotas). Machines will be replaced on an attrition basis.

Conclusion:

Per the above recommendation, we **seek your approval to formally identify CBS as the Vendor of Interest, in this pursuit of a strategic partnership and immediately move to commence with contract negotiation.** UConn Storrs and the Regionals will need a mandate via memorandum from senior leadership in support of the MPS program targeting academic, administrative, and operational areas. It is imperative that all constituent areas participate to maximize the estimated results of the MPS program.

Similarly to Storrs and the Regionals, UCH will require a mandated initiative to reinforce their current MPS program and future enhanced printing activities.

PROS & CONS

Pros:

- **Seamless On-site, Proactive Service and Support:** The program will provide UConn with only one number to call for your printer and MFD needs, saving departments’ valuable time. CBS will have on-site staff, equipped to handle any issue that may arise. The CBS 360 monitoring technology allows their team to proactively solve issues (low toner/staples, device failure, etc.) with networked devices, through proactive monitoring and remote support. This remote monitoring allows CBS to address most issues before they interfere with operations. If an issue cannot be resolved remotely, CBS can dispatch a first responder to provide service, rather than waiting on a call from the user to report a problem.
- **Reduce Overall Output Costs:** Printing is one of the most overlooked and unmanaged expenses within an organization. It is also one of the most costly. The MPS program will help the University control document output costs by using CBS’s Xerox technology. During these challenging financial times, it is imperative for UConn to adopt cost saving measures. Cost savings realized from participation in the MPS Program are retained at the department level.
- **Security:** Users are concerned about confidentiality when they print. The CBS Xerox devices have the ability to print securely. With the secure print feature enabled, your job can be retained in the print queue until you swipe your One Card or, at the device’s keyboard, enter a password or PIN number.

- **Added-Value Services:** In addition to increased security, the MPS program includes added-value services such as the ability to print from your desktop and retrieve from most devices on campus and mobile printing.
- **Increase Device Productivity:** Many users either have devices that are underutilized and cost too much, or are over-utilized and require constant service. The MPS program works to “right-size” the placement of devices to ensure each department has the appropriate equipment, with the proper features, to provide document output in the most cost-effective and efficient manner.
- **Sustainability:** The MPS Program will assist in advancing UConn’s environmental and sustainability initiatives through the elimination of equipment that consumes high levels of energy. Equipment default settings may be set to reduce energy consumption and minimize paper usage.

Cons:

- **Loss of Constituent Autonomy:** As a result of properly right-sizing print output equipment, it is understood devices will be removed and/or replaced from the fleet, potentially creating negative sentiments from stakeholders. The University and CBS must market the benefits of the program in a fashion which outweighs the loss of autonomy that departments have historically enjoyed.
- **Creation of a Standard of Adoption:** To maximize the attrition rate of the fleet, the University should develop standards for when device replacement is appropriate.
- **Varying Definitions of Right-Sizing:** It is possible that a department will view the concept and results of a right-sizing initiative in a different manner than the CBS assessment team.
- **Decentralized to a Centralized model:** This initiative may be perceived as the “central office” gaining more control over the decentralized-departmental model. Questions may arise relative to savings for the individual department versus savings for the University as a whole.

FREQUENTLY ASKED QUESTIONS

What is MPS?

Managed Print Services (“MPS”) is a service offered by an external service provider to optimize and manage a company's document output to meet certain objectives, such as driving down costs, improving efficiency and productivity, or reducing the IT support workload. The service provider takes primary responsibility for meeting the customer's office printing needs, including the printing equipment, the supplies, the service and the overall management of the printer fleet. UConn has entered into a multi-year contract with Connecticut Business Systems, a Xerox company (“CBS”) to manage the MPS Program.

The MPS Program includes equipment, service, and supplies (excluding paper); departments will be charged on a price per page of output (one price for black & white only pages and one price for color).

MPS includes:

- Equipment, including multi-functional devices (MFDs), copiers, printers, scanners and fax machines
- Supplies, excluding paper
- Preventive maintenance and parts
- Guaranteed service level response times
- Detailed account usage and simplified billing utilizing a cost per impression model
- Flexibility for equipment changes
- Single contract for increased efficiency in managing contract terms and conditions, and supplier performance
- Other value added services, such as secure print, mobile print, and the ability to print documents from your desktop and retrieve them from other output devices on campus.

How will my department be assessed?

Once you reach out to the Connecticut Business Systems contact, a CBS analyst will contact you to schedule a time to conduct the assessment. The analyst will need an escort through the area to ensure required access to all areas.

During the assessment process, CBS considers multiple factors to ensure the satisfaction of all users. Although monthly volume is a major consideration, they will also evaluate other needs such as speed, quality, finishing capabilities, ease-of-use, paper handling capacity, and business needs. CBS will also review the department's needs to print from special applications to confirm the appropriate device is selected.

Will equipment be removed from the department?

In assessing UConn's current printing environment, several areas of improvement were identified. The findings of the initial review revealed UConn's current fleet includes: too much equipment; the wrong type of equipment; and redundant layers of equipment. With this in mind, cost savings and workflow productivity enhancements can be achieved by skillfully balancing the ratio of equipment to users and matching equipment needs more effectively to the user base throughout the campus. Each department assessment will take into consideration the current printing environment, recommend cost savings, and opportunities to employ efficiencies.

What if I do not want to participate or I do, but do not want to lose my device?

The University has determined that participation in the MPS program is mandatory. Based on the thorough assessment, you will be presented with the option that best fits your document output needs and business requirements. CBS is aware that specific business needs exist, which may require augmentation to their approach for compiling a final recommendation.

How will I realize cost savings?

University departments can realize cost savings through the MPS program in various ways. First, the department will not be required to purchase any new devices to participate in the program; costs will be included into a single CPC for black & white and a single CPC for color prints. In addition, the department no longer has to purchase consumables (toner, staples etc.) and administrative support time is relieved.

I. Background

Current State of the University of Connecticut in Managed Print Services

In response to the 2011 McKinsey Report, Procurement Services in conjunction with the “UCount initiative”, identified a significant cost savings opportunity for office equipment and supplies, specifically related to copiers and MFDs. Through preliminary research, Procurement assessed the process by which the University (inclusive of Storrs, UConn Health, and the five regional campuses) procures print hardware and its related services. The result of this research revealed more than ten different suppliers providing these goods and services, creating an opportunity to consolidate our supplier base. The historic approach yielded inconsistent procurement practices, as there were both leased and purchased machines at all University locations, with supplies purchased from several different vendors. Additionally, due to the lack of consolidation of the supplier base, Storrs and the Regionals were unable to determine the annual estimated expenditures on printing costs, including equipment, supplies and service (notwithstanding copy paper, as this is procured under a separate contract). The inefficiency of the current approach was exacerbated by a lack of standards, combined with the fact that purchasing decisions were, and continue to be, made at the departmental level. All expenses for equipment, supplies, and maintenance have been paid for out of departmental budgets. The current fleet of purchases and leases is decentralized, creating an information gap relative to the existing fleet and its usage data. Currently Storrs and the Regionals lack a complete understanding of its inventory of equipment, whether the machines are networked or stand-alone. In order to retrieve this data, Storrs and the Regionals must request it from each of the vendors, a slow and inefficient process.

This approach led to inefficient and ineffective practices, as there was not an ability to leverage the expenditures in efforts to secure more competitive rates. These factors were key motivators in the development of a Fleet Management initiative, now referred to as Managed Print Services (“MPS”). According to Gartner Research, the typical cost savings enjoyed as a result of implementing an MPS program is between 15% and 30% per year.¹ This projected savings was a key factor in the initiation of the MPS program. However, because Storrs and the Regionals are contemplating the adoption of an attrition-based model rather than a traditional full-replacement which would typically occur as a result of the deployment of an MPS initiative, these savings are unlikely to be achieved until year 5 when the entire University fleet has been converted.

¹ Ken Weilerstein, Sharon McNee, Elizabeth Kim. “Gartner Research, Magic Quadrant for Managed Print Services, Worldwide.” October 21, 2013. ID: G00219329. Pg. 18

II. Procurement Processes

Fleet Management Request for Information/Introduction to Managed Print Concept

On August 12, 2011 the University of Connecticut released a Request for Information (“RFI”) for Copier/Printer Fleet Management in an effort to gather information on products and services which would yield opportunities to reduce costs and increase operational efficiencies. Fleet Management, for purposes of this document, is defined as a single-vendor contract which offers equipment and its related services, the same type of contract the University of Connecticut Health Center currently has with Xerox. As a result of the RFI, the University received a total of nine responses. In review of said responses, the University identified additional services which would be necessary for the successful implementation of a structured program, including change management, tracking and monitoring of purchases, usage statistics of each device, consolidation efforts/plans, data security improvements, preventative maintenance strategies, consultant support, and improved customer support.

Requested content requirements for the final presentations included current service options and configurations, right-sizing methodology, activities, technologies utilized, timelines, short-term costs, benefits and cost savings, accountability/transparency, post-implementation strategies, project management and flexibility in working with other vendors as necessary.

The vendor RFI presentations revealed an increased scope of proposed services to include print cost management and print queue management. From these presentations the committee, as outlined below, comprised of various stakeholders with various degrees of participation through each step of the process decided to change the initiative from a Fleet Management approach to a managed print model.

- Robert Rowland – UITS Enterprise Administration Systems
- Bill Hengstenberg – UCH Reprographics
- Lori Nye – Document Production Center
- Dan Pelletier – UITS
- Robert Morrell – UITS
- Dave McCormick – UITS
- Roxanne Roy – UITS
- Steve Maresca – UITS
- Dan Cappetta – Student Affairs IT
- Ryan Koscondy – West Hartford
- Melanie Savino – “UCount” Committee Chair
- Ross Hoel – UITS
- Dianne Nedjoika – UCH Reprographics
- George Assard – School of Engineering
- Cyndi Soucy – School of Business
- David Hicking – Library
- Geoffrey Meigs – CLAS
- David Logan – Fine Arts
- David Evans – Athletics
- Stephanie Kernozicky - OneCard Office

MPS is a service offered by an external service provider to optimize and manage a company's document output to meet certain objectives, such as driving down costs, improving efficiency and productivity, or reducing the IT support workload. The service provider takes primary responsibility for meeting the customer's office printing needs, including the printing equipment, the supplies, the service and the overall management of the printer fleet. MFDs and printers are owned by the vendor and placed within the University with the only applicable charges being a cost per page of output, referred to as a CPC. This charge includes all maintenance, parts, labor, and supplies (i.e. toner, staples), excluding paper. Managed print programs provide value to institutions who implement them by standardizing the fleet of equipment, optimizing equipment placement, and providing optimized services such as consumable monitoring, on-site technical support, and value-added services (such as secure printing and print queue management), thereby decreasing costs and driving efficiencies. Additional information secured through the RFI revealed additional potential soft cost savings for the University by increasing floor and desk space (through the consolidation of devices), decreasing burdens on University IT staff (through automated consumable and service monitoring), and reduced energy consumption.

Request for Qualifications

The Request for Qualifications (“RFQ”) was released on February 5, 2013. The RFQ served to formally solicit the qualifications of firms who had have an interest in providing managed print services, with the end result being a list of prequalified firms whom the University would then exclusively solicit final proposals. A total of eight (8) firms submitted responses to the RFQ:

- Flo-Tech
- Xerox
- Connecticut Business Systems
- Canon
- Ricoh
- Aztec Office
- Lexmark
- A&A Office Systems

The evaluation criterion for this stage of the initiative included considerations for: Organizational Capability; Work Approach & Staffing Plan; Key Personnel List; and References & History of Success. After an evaluation of all submissions, the following firms were identified as pre-qualified and would be provided the exclusive opportunity to submit a proposal in response to the MPS Request for Proposal (“RFP”):

- Xerox
- Connecticut Business Systems (“CBS”)
- Canon
- Ricoh
- Lexmark

Request for Proposal

Upon completion of the vendor prequalification, the committee convened to discuss the next steps to ensure progression of the initiative. As a new and complex effort, the committee’s goal was to determine how to best work through the inherent challenges of a complex initiative. The

initial plan required two separate assessments: First, all five vendors would simultaneously assess select buildings on the Storrs campus in order to evaluate vendor practices and procedures; second would be a complete University walkthrough after the selection of two vendor finalists. However, the scheduling of five separate vendors to walk through the buildings was decided to be too burdensome; therefore, the committee attempted to design a model where all five vendors would conduct the preliminary walkthrough simultaneously. After careful consideration, it was determined that each vendor's individual practices and procedures could not be clearly evaluated if all vendors were present.

In response to these design challenges, Procurement retained Copier Audit Inc., a document expense-auditing consulting firm ("Copier Audit"), to assist with the design and creation of both the RFP and the on-site assessment. The intent of this relationship was to support the drafting of the scoping document and to provide feedback in the design and execution of the walkthrough in efforts to reach the goal of an RFP release by October of 2013. This key milestone was critical, as UCH required a contract in place by May of 2014 to ensure fleet replacement by September 1, 2014, as their existing contract was expiring. Based on recommendations of Copier Audit, the number of walkthroughs was decreased from two to one and would be performed by two (2) vendor finalists whom would be selected as a result of an initial round of evaluation. The finalists were then required to conduct a full assessment of the University and then submit a Best and Final Offer ("BAFO"). The intent of this change was to encourage a full multi-campus assessment which would include Storrs, UCH and the Regional campuses in Avery Point, West Hartford, Stamford, Torrington and Waterbury ("the Regionals"). By including the on-site assessment as part of the RFP in pursuit of the contract award, the University properly incentivized the vendor finalists which resulted in a more competitive procurement.

Next Copier Audit, the Project Manager, and Procurement staff met with various stakeholders from different departments and campuses across the University, including but not limited to members of UCH, the West Hartford campus, the School of Business, Student Affairs IT, and the Engineering Department. The goals of these meetings were to:

- Gain stakeholder feedback in efforts to identify key issues which the MPS program would serve to solve;
- Identify potential issues resulting from the implementation of a managed print program;
- Secure recommendations on program administration and contract management.

After multiple discussions with Copier Audit and key stakeholders, the RFP was compiled and released on October 11, 2013 to the list of five (5) prequalified firms. Four (4) of the five (5) prequalified companies responded before or on the deadline of November 21, 2013, with Lexmark electing not to participate.

Proposals submitted but the above-references companies were evaluated based on:

- Organizational Capability;
- Account Support & Staffing Plan;

- Implementation, Deployment & Transition-Out Plan;
- Technology Features and Functionalities of Proposed Hardware, Infrastructure and Software, and Security Plan;
- Pricing/Fee Structure;
- References & History of Success; and
- Reporting/Analytical Capabilities.

Upon receipt, proposals were evaluated by a committee of key stakeholders, identifying Xerox and CBS as the two vendor finalists who were to complete the on-site assessment and submit a BAFO.

III. Final Vendor Selection: Vendor Presentations & Best and Final Offer

The final selection of a Vendor of Interest was contingent upon content of the BAFO and the substance of the vendor finalist presentations held on February 4, 2014 in the School of Business Board Room. The BAFO and vendor presentation, as integral components of this critical procurement, provided an opportunity for vendor finalist(s) to submit a refined proposal and present the same, which included a number of elements associated with cost and key business terms. The committee determined the following as key components for the vendor presentation, which directly correlated to the content requirements of the BAFO:

- Change Management Plans
- Implementation Approach and Program Vision
- Proposed Cost Savings
- On-Site Support
- Phase Two Assessment (referred to as on-site assessment)
- Sample Rightsizing Model
- Added-Value Service Offerings
- Optimized Services
- Key Differentiators
- Technology Requirements

A. Change Management Plan

1. Connecticut Business Systems

The CBS Change Management system begins with a marketing campaign built around multiple media vehicles in an attempt to reach as much of the University population as possible. Their approach also includes more segmented approaches at specific University departments to ensure gaps are not overlooked within the University faculty/staff. The themes of the marketing materials will revolve around five (5) key areas:

1. “Green” Theme/Sustainability

2. Security
3. Regulatory Compliance
4. Improved Productivity Through Standardization
5. Time & Cost Savings

Marketing Vehicles

Email Marketing

Initially CBS is planning to create an email marketing campaign announcing the agreement between the University and CBS for the MPS program. These emails will also have video files attached introducing the MPS program, key concept and benefits. CBS would partner with the University to craft these emails to ensure the most effective message is reaching the UConn community.

Direct Mail/Posters

Next CBS would be deploying a direct mail campaign to University mailboxes. The proposed vehicle is MPS flyers introducing MPS to the community as well as flyers announcing CBS “Blitz Days” and CBS Open House days (both described in greater detail below). This campaign would also include strategic placement of posters across campuses to increase awareness about the MPS program.

Message Boards and Signage

CBS will also incorporate its marketing with their sponsorship agreement with UConn athletics. This includes both message boards and signage at the UConn men’s and women’s basketball games and UConn football games.

CBS On-Site Blitz Days

The CBS-UConn staff will spend approximately 4-6 days (possibly more) at various UConn locations to provide program awareness to the University. This type of program is more marketing focused than the CBS Open House.

CBS On-Site Open House

These will be completed at all campus locations and are information based. The CBS team anticipates meeting with various departments to showcase the latest Xerox technology including MFDs, printers, Smart boards, software and tools for departments to utilize. In addition, CBS will offer informational breakout sessions focused on topics such as sustainability, best practices, Xerox MFD training, workflow for the “Green Office,” and UConn/CBS 360 Analysis training.

Television Ad Campaign

CBS intends to create a television campaign to be publicized on UCTV in an effort to increase program awareness. The campaign will include a series of videos that focus on the advantages of an MPS program, workflow inefficiencies and how to engage with your CBS representative for a departmental assessment.

B. Implementation Approach and Program Vision

1. Connecticut Business Systems

CBS's implementation plan is based upon a five (5) phase approach which culminates with a post-implementation satisfaction review. CBS's process is heavily customer relations-based, and includes both understanding and calculating the costs of the current printing culture at the University, along with significant communication (through multiple vehicles) between CBS and the stakeholders. This style is combined with a data driven program analysis to complete their launch.

Phase One: Initiation/Project Scope

This section includes a significant portion of CBS's change management plan discussed above. Post initiation CBS would complete a full assessment of the Storrs campus, UCH and the Regionals to fully determine the needs of the customers on a department level basis. This would include not only the acquisition of data from machines on campus (to utilize further updated numbers) through installation of their proprietary CBS 360 software to measure output, but also meeting with key stakeholders at each department to determine programmatic /business requirements that would need to be filled by the MPS program. This also allows CBS to determine the current culture and the costs of the culture at UConn, which is used to confirm if current strategies align with business objectives or if alterations are required. By completing a full assessment CBS is also able to identify other underutilized, obsolete or redundant machines. CBS will utilize all of this data to create a total cost of ownership (TCO), including the direct and indirect costs from the current printing culture, calculate out all of UConn's current printing costs and prescribe how those expenses could be reduced through the MPS program.

Finally CBS will study the sustainability of the printing culture to aid UConn in becoming more environmentally friendly by:

1. Lowering energy consumption;
2. Lowering CO2 output and emissions for improved carbon footprint;
3. Reducing paper waste;
4. Using less consumables (toner, staples etc.); and
5. Remaining energy conscious.

CBS has a proprietary sustainability calculator that they use to show departments what their current sustainability model looks like.

Phase Two: Planning and Design

After gathering the information from the assessment, CBS will create their own rightsizing plan for UConn on a department-by-department basis. This program could include adding, removing, replacing, or moving devices after meeting with each department individually to determine their own unique printing needs and business practices. CBS mentioned that their goal is have machines within a 20 second walk for stakeholders in each department (compared to 1 minute as recommended by Gartner). The University's current walk time data is unavailable, although

another intention of this initiative is to define acceptable walk times. Another goal of the right sizing phase is to decrease the employee to device ratio. Currently the University has a 2.1:1 employee to device ratio; however, CBS’s right sizing can improve the ratio from 5:1 up to a maximum of 30:1 depending on how aggressively the University and its stakeholders choose to implement their recommendations.

Attrition Model

Included in the Planning and Design phase is the CBS attrition model which assumed that MFDs five years or older would be replaced in the first year of the contract. Therein, once a machine reaches five years of age, it would then be replaced as well, hence the attrition model. CBS’s attrition plan includes a 59% conversion rate in year one with a complete conversation of the campus fleet by the end of year five. The year-by-year fleet conversation rates proposed are outlined in Table 1 below.

Table 1: CBS Attrition Model

<u>Upgrade Year</u>	<u>Total # of Devices Upgraded</u>	<u>Annual Fleet Conversion Rate</u>
Year 1	170	59%
Year 2	43	15%
Year 3	14	5%
Year 4	37	13%
Year 5	22	8%

Phase Three: Installation of Equipment

This Phase is when CBS will physically implement their plans with the departments that elect to participate in the MPS program. It is during this stage that the attrition model replacements will begin to occur. All of the changes made will be based upon the data gathered in the post-award assessment and the right-sizing plans that were created in Phase Two.

Phase Four: Software Integration

After deploying a machine CBS will install the required drivers for the machine so that it is able to print off of UConn servers. The CBS 360 system does not require its own server to run. Based on CBS’s proposal and preliminary discussions with key stakeholders, no initial investment in hardware will be required.

Phase Five: Project Acceptance and Satisfaction Review

After the devices are installed with the correct drivers CBS will continue to work with departments to ensure achievement of cost savings and improved sustainability. Much of this is done through their Account Management staffing plan. This includes having two on-site technicians at the Storrs campus and one on-site technician at UCH. The On-site support will be

discussed in greater detail below. CBS’s goal is to gain acceptance of the MPS program by providing a strong customer serviced based approach that targets specific departmental needs and then maintain program momentum beyond day one implementation.

C. Proposed Cost Savings

1. Connecticut Business Systems

CBS determined that savings would come through assessments using their 360 Application as well as detailed interviews with stakeholders to determine optimal needs and special accommodations for their print environments. Additionally, CBS recommended that UConn could achieve cost savings in other areas by:

1. Migrating print from printers and fax machines to MFDs;
2. Diverting large print jobs to UConn Document Production Center;
3. Avoiding new printer and fax purchases;
4. Avoiding new and old service contracts on existing equipment;
5. Avoiding the purchase of toner and supplies (printers and faxes); and
6. Avoiding the cost of IT resources for:
 - a. Break Fix;
 - b. Installations help desk; and
 - c. Internal responsibilities.

Print Migration Strategy

CBS provided migration strategies to drive print volumes from single function devices (such as printers and fax machines) to MFDs.

UCH

CBS provided the monthly savings if UCH could drive 25%, 50% and 75% of monthly volume **from** output devices such as printers and fax machines **to** MFDs for their document production needs.

Table 2: CBS Migration from single-use devices to MFDs - UCH

Percent Migration	Savings Monthly	Savings Annually	Savings Contractually
25%	\$13,253	\$159,036	\$1,590,360
50%	\$26,445	\$317,336	\$3,173,364
75%	\$39,698	\$476,372	\$4,763,724

Storrs & Regionals

Similar the UCH version, CBS provided projections based on driving greater volume to MFDs rather than printers and faxes. These projections are also based on 25%, 50% and 75% monthly volume migrations.

Table 3: CBS Migration from single-use devices to MFDs – Storrs and Regionals

Percent Migration	Savings Monthly	Savings Annually	Savings Contractually
25%	\$19,659	\$235,904	\$2,359,044
50%	\$39,340	\$472,082	\$4,720,824
75%	\$58,921	\$707,057	\$7,070,568

Based on CBS’s attrition model outlined in Table 1, below are their estimated monthly savings which would be realized:

Table 4: Monthly Savings Based on Table 1 Attrition Model

<u>Upgrade by year</u>	<u>Estimated Monthly Savings</u>	<u>Estimated Savings (%)</u>	<u>Estimated Savings (\$) over term of contract</u>
Upgrade in 2014	\$ 16,903	48%	\$ 1,014,175
Upgrade in 2015	\$ 4,841	46%	\$ 232,365
Upgrade in 2016	\$ 1,509	50%	\$ 54,320
Upgrade in 2017	\$ 3,164	50%	\$ 75,940
Upgrade in 2018	\$ 2,072	41%	\$ 24,861
Total	\$ 28,489	Total	\$ 1,401,662

UCH Like for Like

After consulting with Copier Audit, it was determined that the best way to evaluate proposed pricing extended by each finalist was to secure a monthly cost proposal based on a like-for-like replacement of MFDs at UCH. This decision was made based on UCH already having had the necessary fleet data to ensure a fair and equal comparison of a standardized device list. After receiving a fleet device list from UCH, it was shared with the finalists for their own pricing solutions. Under the current contract UCH’s monthly spend is approximately \$48,282.03, excluding paper. Table 5 below outlines the projected monthly cost based on a like-for-like replacement of UCH’s current fleet of MFDs.

Table 5: UCH Projected Monthly Cost (based on like-for-like replacement)

<u>Vendor</u>	<u>Projected Monthly Price</u>
CBS	\$15,678

Based on the current monthly cost for the UCH fleet and the projected monthly cost outlined in Table 5 above, Table 6 below outlines projected monthly savings for UCH.

Table 6: UCH Projected Monthly Savings (based on like-for-like replacement)

<u>Vendor</u>	<u>Projected Monthly Savings</u>
CBS	\$32,604

D. On-Site Support

1. Connecticut Business Systems

Staff and Service

CBS's Proposed Post-Award Team:

- | | |
|--------------------------------|---------------------------------------------------|
| 1. Service Department | 8. CBS Warehouse/Delivery Team |
| 2. Customer Care Center | 9. Program Manager |
| 3. 360 App Team | 10. Dedicated On-Site Assessment Analyst (Storrs) |
| 4. CBS Supplies Team | 11. Dedicated On-Site MPS Analyst (UCH) |
| 5. CBS Help Desk | 12. Technical Support |
| 6. Client Relationship Manager | |
| 7. CBS Preflight Team | |

Included in this team are two dedicated onsite technicians for the Storrs campus and one dedicated onsite technician for UCH. Also included are technicians and backup technicians for all locations. Print volumes are continuously monitored so technicians can be added to meet the needs of the campus community as volume increases. CBS will also provide a dedicated Local Field Service Manager. CBS staffs 85 field service technicians, 50 of whom are Connecticut-based. In addition CBS will provide a dedicated Customer Care Center in Newington, CT and a dedicated Customer Care Representative for the University's account. CBS will also provide an in-house network helpdesk team for remote assistance and an in-house hardware support helpdesk team.

Average Response Times:

- 2 hours for UConn Storrs and UCH
- 4 hours for UCH off-sites and Regional campuses
- Technicians to provide estimated time of arrival ("ETA") within 1 hour after placed call.
- Response times are monitored by the CBS dedicated Customer Care Representative

Status alerts are emailed directly to the onsite technicians for proactive service approach. This also includes ongoing preventative maintenance, both clinical and critical. CBS tracks service times and statuses via their territory mapping software and creates specific territories for their technicians based on volume of managed prints, size of machines, and size of the territory. Technicians' cars are equipped with a GPS feature so that they may be tracked and also guided to calls by the most efficient routes possible. The Customer Care agent can see all the technicians' calls and locations using their MWA dispatch.

Three (3) ways to place services calls:

1. On-Line web call
2. Phone
3. Email

Four (4) ways to reach network support:

1. Live Chat
2. Email
3. Phone
4. On-site Service

Supplies

CBS will house Customer Replaceable Units (“CRUs”), key parts and supplies onsite for hot swaps of MFDs and printers. In addition spare MFDs and printers will be stored in key areas at both the Storrs campus and UCH to ensure that departmental issues will result in the least amount of downtime possible.

Additionally, CBS stores over \$5M in supplies at their local warehouse in Newington to ensure parts are always local and accessible for UConn machines, mitigating any concern for transit time if parts need to be ordered for various service calls.

E. Phase Two Assessment

1. Connecticut Business Systems

During the phase 2 assessment CBS was lead around the University by various UConn staff members. During the assessment CBS was able to pull configuration pages which have page counts (both mono and color if applicable), manufacturer, model, serial number, and IP address and device configuration. CBS also assigned each device its own asset number, while also collecting the site (UCH/Off-sites/Storrs/Regionals), building, floor, department and room number.

After the Phase 2 assessment, CBS found that UCH has a predominantly decentralized print strategy and utilizes separate devices for each application (i.e. copier, printer and a fax machine all providing one function rather than utilizing an MFD that can perform all three functions). CBS found areas with congested workflow which are in need of potential consolidation (right sizing) or upgraded technology.

Business Applications and UConn Needs

Post-assessment CBS determined potential needs for UConn, UCH and the Regionals in a multitude of areas.

Service

1. Timely response to service requests, both phone and email
2. Regional Campuses want the same SLAs and service attention as is received at Storrs

3. Automatic toner ordering and delivery at 15% inventory levels (UConn can change this number if they desire)
4. Preventative maintenance performance on based on seasonal peaks and valleys of departmental operations

Strategy/Right Sizing

1. Proper consolidation of devices based on appropriate workflow and usage patterns, not just volumes and proximity (conduct business interviews when appropriate)
2. Develop an attrition-based strategy for the departments
3. There are many opportunities for consolidation, specifically the vast number of scanners, faxes, inkjet printers and local LaserJet printers
4. Eliminate color inkjets and color LaserJets
5. Print migration from printers to MFP's (cost reduction strategy)
6. Implement solutions that have a positive impact on UConn's green initiatives and to become as "paperless as possible"
7. Departments would like standardization of equipment throughout their departments
8. Departments want easier deployment strategy for new equipment

Technology

1. Swipe card and cost recovery software
2. Hardware that is easy to install and put on the network
3. Devices that can print high volume board meeting booklets, where required
4. Tracking and bill-back of prints and copies based on cost-centers of shared machines
5. End users expressed interest in scanning solutions to create editable documents

Reporting

1. Monthly and quarterly reports
2. Easy to access portal or easy distribution
3. Quarterly reviews for fleet and device management

F. Sample Right Sizing Model

1. Connecticut Business Systems

Oak Hall

<u>Floor</u>	<u>Current # of Devices</u>	<u>Current Monthly Costs</u>	<u>Proposed # of Devices</u>	<u>Proposed Monthly Cost</u>	<u>Savings</u>
Linguists/Econ	9	\$999	8	\$839.00	\$160
Journalism/Political Science	6	\$526	2	\$233.39	\$293

Table 7: CBS Rightsizing Example – Oak Hall

Student Union

<u>Floor</u>	<u>Current # of Devices</u>	<u>Current Monthly Costs</u>	<u>Proposed # of Devices</u>	<u>Proposed Monthly Cost</u>	<u>Savings</u>
1 st	7	\$858	5	\$411	\$447
2 nd	13	\$1310	9	\$701	\$609
3 rd	13	\$1465	11	\$1256	\$209
4 th	20	\$2210	14	\$1,040	\$1,170

Table 8: CBS Rightsizing Example – Student Union

G. Added Value Service Offerings

1. Connecticut Business Systems

CBS offered added value benefits for document management and cost objectives as well as other key functional areas.

Document Production and Cost Objectives

1. Buyout of current leases
2. Provide service on other manufacturer's equipment
3. Local customized billing
4. Partnerships with solution partners
 - a. Fax Server Solutions (fax services without the cost of a phone line)
 - b. Web Store Front Solutions
 - c. FileNet (scan capture solutions)
 - d. Card swipe integration with Banner (Pharos)
 - e. Document Management Solutions (SmartSearch)

Non-Cost Objectives

1. Transition from paper to digit and allow integration with student records
2. Embed intelligence in UConn documents to automate routing and approvals
3. Integration with FileNet
4. Build content repositories with tagged information for easy search and retrieval

Mobile Printing

1. Submit documents via email to device (as attachment)
2. Mobile print sends confirmation email back to smartphone
3. Select Mobile Print on Xerox Control Panel
 - a. Enter confirmation code
 - b. Select file & preview
 - c. Enter print settings and print

H. Optimized Services

1. Connecticut Business Systems

CBS 360 Application

CBS's 360 Application is supported by a UConn dedicated team of 360 App specialists. Their roles include installing and monitoring accounts, filling toner supply orders and filling CRU orders. CBS also offers three ways to reach the App Support team: 360 App Hotline (phone), email or live chat.

In addition the CBS 360 Application can provide detailed device information reports that contain the make, model, serial number, total pages, mono pages, and color pages for reporting cycles of different lengths (i.e. monthly, quarterly, annually). The CBS 360 Application also can provide ASM alerts for consumables, displaying which machines have low toner, staples or other consumables and need to request new supplies. Finally the CBS 360 Application can track fleet volumes by manufacturer as well as total devices by manufacturer.

I. Key Differentiators

1. Connecticut Business Systems

CBS's key differentiators primarily focused on their benefits of being a smaller, local company that is allowed to move faster than their competitors due to less bureaucracy.

The Local Difference

1. Xerox technology, Xerox brand, and local CBS accountability
2. Senior Management/Local Decision Process- Nimble, responsive, less red tape
3. Local Customer Care Center located in Newington, CT
4. Service Mapping Systems that allow for efficient turnaround time
5. 25 point check list completed on every service call to insure uptime
6. Customized SLAs and Reporting
7. Local help desk assistance for immediate response
8. 42,000 sq. foot warehouse with over \$5 million in parts, equipment and supplies
9. All products stored and shipped locally
10. Local CBS network technicians
11. Parts and technical staff tracking with GPS and call routing
 - a. Automated Dispatch System (ADS) can locate technicians at the street level and automatically route them for a faster response time
 - b. Technicians have android smart phones which allow them to see:
 - i. Online account services history and demand
 - ii. Online manufacturer parts management and order
 - iii. Complete call schedule and service alerts
 - c. Prompt callbacks, rescheduling and instant reporting
 - d. Technician's vehicles in sync with ADS system.
12. CBS product and solution trainers for end user guidance

13. All technicians have flex-fuel vehicles fully stocked with parts
14. Local billing for all service and supplies
15. Monthly, quarterly or semi-annual account reviews
16. Local analysis team
17. All services are performed locally, including all printer supplies

J. Technology Requirements

1. Connecticut Business Systems

The CBS 360 Application can manage the entire print fleet by networking the remaining copiers to collect the meter reads. There is no additional server required for our MPS program. The 360 Application can collect monthly information for the UCH print shop and provide monthly CSV reports, removing the need for the Access-based fleet maintenance interface. This file can then be uploaded into Banner, reducing the complexity and support for the Access program.

CBS also recommended deploying an enterprise-wide secure print release solution. This would allow UConn to have the ability to limit the number of print drivers in their print environment. This can be done with the print drivers being either part of the PC image used at UConn or part of a printer package being pushed out. Either way, UConn would no longer be managing print drivers from desk top to desk top. UConn could access a universal queue that can be accessed from any location and any device.

IV. Next Steps & Required Decisions

The next step for the University is to announce its Vendor of Interest, negotiate and execute the contract, and commence implementation. A preferred single vendor agreement will be pivotal in the future state of the University's print environment, as this strategic partnership is proposed for two (2) five-year terms. The University's evaluation committee, consisting of a plethora of key stakeholders from constituent schools, regional campus(es), departments, and entities, has completed its evaluation and identified a proposed Vendor of Interest.

The University must develop a supported procurement strategy regarding the purchase of managed print services, devices, and supplies in support of the program. The current decentralized model is simply unsustainable and prevents the University from compiling key analytics to drive future cost savings and efficiencies. By ensuring the University utilizes a single preferred vendor for the procurement of MFDs and networked printers (along with the related services and supplies), opportunities to obtain and measure document output costs on a monthly, quarterly, and annual basis would be available which have not been previously. This data will become crucial in maximizing cost savings over the life of the contract. This type of policy requires a commitment of support from senior leadership to ensure compliance from departments within the University.

Additionally, the University must develop a chargeback model for Storrs and the Regionals. The chargeback considerations are as follows:

1. Using department level codes for printing needs (that would tie to a KFS account and transfer across campuses and machines rather than just machine location being the sole determination of billing);
2. Personal employee codes (each employee would have a printing code tied to a departmental KFS account number) to determine which department would be charged for each document output; or
3. Machines are billed from the centralized area, currently identified as the Document Production Center (“DPC”), who will operate in a fashion similar to the Reprographics Department at UCH. That model considers DPC as the service provider to the Storrs and the Regionals, who is billed by the vendor, and charges back departments.

Procurement, as part of the contract negotiation phase, needs to determine which reporting metrics must be released at the monthly, quarterly or annual reviews. Timely release of these statistics/metrics is critical for events such as budgetary planning, compliance, and Board of Trustees spend reporting. If metrics are not established, these decisions will be made at the departmental level, further perpetuating the decentralized model and preventing opportunities to reduce cost and drive efficiencies.

Lastly, a pivotal component which requires input from senior leadership is the development of standards (and outlining of instances which warrant an augmentation to the standards) of the mandated adoption of CBS’s right-sized environment.