

Purchase Order



Direct all inquires regarding this order to: (304) 696-2727

Marshall University
Office of Purchasing
One John Marshall Drive
Huntington WV, 25755-4100

Purchase Order #
MU23MSCALLCTR

TO: LANDIS TECHNOLOGIES LLC 1120 DIVISION HIGHWAY EPHARATA, PA 17522 FEIN: 47-5410072 PH: 717-733-0793	Vendor Code: 475410072	Ship to: Room #	THIS ORDER IS SUBJECT TO THE GENERAL TERMS AND CONDITIONS AS SET FORTH HEREIN
			WVFIMS Account #:

P.O. Date	FY	Buyer	Ship Via	F.O.B	Terms	Contract #
04/18/2023	23	MW			NET 30	MU23MSCALLCTR

CONTRACT ACCEPTANCE

On behalf of the Governing Board, MARSHALL UNIVERSITY
hereby accepts the quotation of Landis Technologies, LLC

signed by Preston Martin

Title Channel Manager

on March 7th, 2023

Approved as to form this ____ day of _____,
West Virginia Attorney General

By: _____
Chief Counsel


Microsoft Native Teams Contact Solution Center
Effective: 04/19/2023 - 04/18/2024
with four (4) optional one-year renewals

THIS ORDER IS EXEMPT FROM ALL SALES TAX
LIMIT EACH INVOICE TO A SINGLE PURCHASE ORDER NUMBER

Line No.	Fund	Org.	Account	Encumber Amount	Total:
1.	119002	5311	70275	\$7,500 FY23	\$7,500
2.					
3.					
4.					

Mail Original Invoice and 1 Copy to:
Marshall University Accounts Payable
One John Marshall Drive Huntington,
WV 25755-4500

Michelle Wheeler 4/18/23
Authorized Signature Date

Request for Proposal		Marshall University Office of Purchasing One John Marshall Drive Huntington, WV 25755-4100 Direct all inquiries regarding this order to: (304) 696-2727	Bid Number MU23MSCALLCTR
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Vendor:	For information contact: Michelle Wheeler, Office of Purchasing Phone: (304) 696-2727 Email: michelle.wheeler@marshall.edu & purchasing@marshall.edu
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Sealed requests to bid for furnishing the supplies, equipment or services described below will be received by the institution. TO RECEIVE CONSIDERATION FOR AWARD, UNLESS OTHERWISE NOTED, THE BID WILL BE SUBMITTED ON THIS FORM AND UPLOADED INTO THE MU BONFIRE PORTAL ON OR BEFORE THE DATE AND TIME SHOWN FOR THE BID OPENING. When applicable, prices will be based on units specified; and Bidders will enter the delivery date or time for items contained herein. The Institution reserves the right to accept or reject bids on each item separately, or as a whole, to reject any or all bids, to waive informalities or irregularities and to contract as the best interests of the institution may require. BIDS ARE SUBJECT TO THE GENERAL TERMS AND CONDITIONS AS SET FORTH HEREIN.


DATE 12/20/22	MANDATORY PRE-BID MEETING: No Pre-bid	DEPARTMENT REQUISITION NO. MU23MSCALLCTR	BIDS OPEN: 01/10/23 at 2:00 p.m. EST Broadcast via Teams at https://tinyurl.com/4vwfd5cm	BIDDER MUST ENTER DELIVERY DATE FOR EACH ITEM BID
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Item #	Quantity	Description	Unit Price	Extended Price
		Request for Proposal Marshall University, on behalf of the Board of Governors, invites Sealed proposals to provide all Work, including but not limited to labor, material, equipment, supplies, and transportation for: MICROSOFT TEAMS NATIVE CONTACT CENTER SOLUTION (services) One (1) year Contract with four (4) optional one (1) year renewals All proposals must be submitted in accordance with the Bidding Documents issued by the Request for Proposals issued by Marshall University's Office of Purchasing.		
Total				

To the Office of Purchasing,
 In compliance with the above, the undersigned offers and agrees, if this offer is accepted within _____ calendar days (30 calendar days unless a different period is inserted by the purchaser) from the bid open date, specified above, to furnish any or all items upon which prices are offered, at the price set opposite each item, delivered at the designated point(s), within the time specified.

Bidder guarantees shipment from _____ within _____ days
 After receipt of order at address shown

FOB _____
 Terms _____

Bidder's Name: Preston Martin
 Signed By: 
 Typed Name: Preston Martin
 Title: Chapel Manager
 Email: Preston@LandisTechnologies.com
 Street Address: 1120 Division Highway
 City/State/Zip: Ephrata, PA 17522
 Date: 3/7/23 Phone: 717-233-0793
 Fein: 47-5410072

BOG 43

Primary Responses

Success: All data is valid!

Status	Bid/No Bid Decision	#	Service Area -Per Agent Cost	Quantity Required	<div style="border: 1px solid black; padding: 2px;">Numeric</div> COST PER AGENT	Total Cost
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Staff Services

Success: All values provided	Bid	#1-1	Agents 1 through 25	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#1-2	Agents 25 through 50	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#1-3	Agents over 50	0	\$ 75.00	\$ 0.00

Financial Aid

Success: All values provided	Bid	#2-1	Agents 1 through 25	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#2-2	Agents 25 through 50	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#2-3	Agents over 50	0	\$ 75.00	\$ 0.00

Admissions, Records, & Registration

Success: All values provided	Bid	#3-1	Agents 1 through 25	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#3-2	Agents 25 through 50	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#3-3	Agents over 50	0	\$ 75.00	\$ 0.00

Cost Per Integration -Staff Services (ServiceNow)

Success: All values provided	Bid	#4-1	Agents 1 through 25	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#4-2	Agents 25 through 50	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#4-3	Agents over 50	0	\$ 75.00	\$ 0.00

Financial Aid (Slate CRM)

Success: All values provided	Bid	#5-1	Agents 1 through 25	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#5-2	Agents 25 through 50	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#5-3	Agents over 50	0	\$ 75.00	\$ 0.00

Admissions, Records, & Registration (Banner)

Success: All values provided	Bid	#6-1	Agents 1 through 25	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#6-2	Agents 25 through 50	0	\$ 80.00	\$ 0.00
Success: All values provided	Bid	#6-3	Agents over 50	0	\$ 75.00	\$ 0.00

MISC.

Success: All values provided	Bid	#7-1	Implementation	0	\$ 5,000.00	\$ 0.00
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Success: All values provided	Bid	#7-2	Training	0	\$ 0.00	\$ 0.00
Not Bidding	No Bid	#7-3	All other Charges	0		
Other Call Center Support						
Not Bidding	No Bid	#8-1	WebChat / Agent	0		
Not Bidding	No Bid	#8-2	Social Network / Agent	0		

Recording is included with all users quoted above.

1 hour of Manger training and 1 hour of agent training is included

Implementation services are optional.



1120 Division Hwy Ephrata PA 17522
Phone 717.733.0793
www.LandisTechnologies.com

Regarding: MU23MSCALLCTR- Microsoft Teams Contact Center Solution

Vendor: Landis Technologies LLC

Address: 1120 Division Highway, Ephrata PA 17522

Phone #: 717-733-0793

Fax #: 717-738-9106

Website: www.LandisTechnologies.com

Contact Name: Preston Martin

Contact Email: Preston@LandisTechnologies.com

Contact Phone #: 717-733-0793 ext 168

Contact Signature: *Preston Martin*

Date: 3/8/2023

Contents

Table of Contents

Title Page	1
Table of Contents	2
Summary of Product	3-4
Project Specifications Response	5-6
Qualification and Experience Information	7
Support and Implementation	8

Summary of Product

Landis Contact Center for Microsoft Teams:

User Interface Features

- Looks and acts just like Microsoft Teams
- Familiar & Intuitive Interface means low training time.
- Keyboard, mouse, or touch support
- Multilingual user interface

Barge In

Wallboards

- Customize data including in wallboards and give access to appropriate users.

Live Sentiment Analysis

- Using Microsoft Cognitive Services

Reporting

- Calls Per Hour
- Agent Details
- Call Details
- Agent Summary
- Wrap Up Answers Summary
- Queue Calls Chart
- In vs Out Call Chart
- Call By Day Chart

Call Recording

- Policy based recording per Queue or per user.

Caller Features

- PSTN or Microsoft Teams callers
- Music on Hold
- Position in Queue notification
- Allow Caller to ask to be called back.

Agent Features

- Persistent Agent Panel with Microsoft Teams User Experience
- Sign in & Out of queues
- Set agent status like Available, Off, & Break.
- Multiple vendor CRM or Line of Business Customer Call Information and Editing via Power Apps
- Agent can be presented with wrap up questions at the end of a call
- Call recording control (based on policy)
- Abandoned Calls Report
- Wall Boards
- Convenient Azure AD Sign In
- Notification when a caller has asked to be called back in the order they were in the queue.

Manager Features

- Active Calls Status
- Barge In
- Wall Boards
- Call Recording
- Granular CDR Access Control
- Live Call Sentiment
- Reports

Manager Features (continued)

- Call Recording Listening portal
- Abandoned Calls
- Agent Summary
- Call Detail Records
- Sentiment Record
- Queue Calls by Hour
- Call Wrap Up Answers
- Agent Status Timeline

Administrator Features

- Familiar Microsoft 365 Administrator portal
- 1 Minute organization setup
- Native Teams App for easy deployment
- Easy Call queue configuration
- Multiple Queue Routing Methods
 - Serial
 - Attendant
 - Skills
 - Round Robin
 - Longest Idle
- Presence Based Routing
- Granular Access Control
- Azure Active Directory
- Office Connection Webhooks Triggers
 - New call in queue
 - Abandoned call
 - End Call
- Microsoft Flow automation via the noted webhook triggers
- Live Microsoft Power BI analytics via the noted webhook triggers
- Supports calls originating from Microsoft Phone Numbers, Direct Routing, or Microsoft Teams Contacts
- Call recording storage can be in your own Azure Blob
- Export Data
- IVR with data dip capabilities

Project Specifications Response

(Section numbers listed below correspond with RFP document)

4.2. Project Goals and Mandatory Requirements: Marshall University's current call center contract ends April 30, 2023 and must be replaced by an MS Teams native contact center by that point. Vendor should describe its approach and methodology to providing the service or solving the problem described by meeting the goals/objectives identified below. Vendor's response should include any information about how the proposed approach is superior or inferior to other possible approaches.

4.2.1. Goals and Objectives – The project goals and objectives are listed below.

4.2.1.1 Call center solution must support an MS Teams native environment.

LCC is an extend model MS Teams integration.

4.2.1.2 Call center solution must be implemented by April 30, 2023.

LCC can be implemented on an expedited basis. It can be live within a few hours. And training can take place within 1 week.

4.2.1.3 Call center solution must provide adequate training.

1 hour of training for agents and 1 hour of training for managers is included in any license subscription. Training is done through a Teams meeting and can be recorded and used for future training.

4.2.2. Mandatory Project Requirements –

4.2.2.1 Call center solution must support an MS Teams native environment.

LCC uses native MS Teams for all calls.

4.2.2.2 Call center solution must have a robust reporting capability including reports by day, by week (or other timeframes), trending reports, answered, abandoned, directed to voicemail, etc.

LCC includes comprehensive reporting including, Calls Per Hour, Agent Details, Call Details, Agent Summary, Wrap Up Answers Summary, Queue Calls Chart, In vs Out Call Chart, Call By Day Chart, Abandon Calls, Calls sent to voicemail, and many other data points.

4.2.2.3 Call center solution must be able to report how many agents are currently on calls (through a dashboard interface).

LCC includes live dashboards that will show all live calls, live number of agents available, and live agent status.

4.2.2.4 Call center solution shall provide agent training functionalities including the ability for an agent to join a call without being heard by the caller, as well as the ability for an

agent to take over a call immediately. – OPTIONAL

LCC had barge in as an option. We have listen in and whisper features on our near roadmap.

4.2.2.5 Call center solution shall have the ability to record a call. – OPTIONAL

Call recording is an option with LCC

4.2.2.6 Ideally, the call center solution shall be HIPAA compliant, or the vendor would be willing to execute a Business Associate Agreement (BAA) – OPTIONAL

All information is stored in a HIPPA compliant platform. (Azure) We do not have a standard BAA but would be willing to consider one pending legal approval.

4.2.2.7 Call center solution shall have the ability to be integrated into the following thirdparty solutions: - OPTIONAL

- i. Active directory
- ii. Banner
- iii. Cerner
- iv. ServiceNow
- v. Customer Relationship Management systems

LCC can integrate data by using call pop from any platform with a rest API. We have simple connectors developed for Dynamics 365, ServiceNow, and Salesforce.

4.2.2.8 Call center solution shall utilize integrated data to recognize incoming calls from students and other university stakeholders, as well as provide insights on the number of times that user has called. – OPTIONAL

LCC queue detail reports will show every time a phone number has called the call queue along with agent that handled the call.

4.2.2.9 Call center solution should provide the capability for queuing based on multiple phone numbers.

LCC can route multiple incoming phone numbers to the appropriate queues and agents.

4.2.2.10 Call center solution should be able to forward messages to voicemails based on specific time periods (i.e., holidays, etc.).

LCC has holiday and business hour sets that give the ability to forward to voicemail in off hours.

4.2.2.11 Call center solution shall include a chat solution (i.e., chat bot, live agent chat, etc.). – OPTIONAL

Webchat, SMS, and Email are all on a roadmap for the LCC.

4.2.2.12 Call center solution shall integrate with Microsoft Teams availability status. - OPTIONAL

LCC integrates with Teams status.

4.2.2.13 Call center solution should have the ability to route calls (i.e., first come first served, round robin, etc.).

LCC can route calls using Round Robin, Serial, Parallel, Longest Ideal, and Skills based.

Qualification and Experience Information

4.3.1.1. At least one implementation in an MS Teams environment serving a health care customer.

Landis Software has been implemented and is currently used by more than 25 health care organizations including surgery centers, Physician networks, Dental organizations, and pharmaceutical companies.

4.3.1.2. At least one implementation in an MS Teams environment service a higher education customer.

Landis Software has been implemented and is currently used by more than 15 higher education organizations. These include US and Foreign based Universities and Technical Colleges.

Support and Implementation

Landis Contact Center license includes ongoing support. We will supply your organization with a portal that can be used to raise tickets directly with our support.

We have 4 levels of tickets:

Priority Level Urgent: (response is 24 hours a day, 7 days a week)
System Down Emergency

Priority Level High: (response during EST zone business hours)
System functioning but major functionality or components not operational.

Priority Level Medium: (response during EST zone business hours)
Individual user or function degraded

Priority Level Low: (response during EST zone business hours)
Fixes for incidents which already have a reliable workaround.
Requests for additional functionality

Implementation services are optional and include the following:

- Full Teams and Contact Center call flow consultation.
- Assistance with design of desired call flow.
- Assistance with setting up all queues and IVRs.

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

TABLE OF CONTENTS

1. Table of Contents
2. Section 1: General Information and Instructions
3. Section 2: Instructions to Vendors Submitting Bids
4. Section 3: General Terms and Conditions
5. Section 4: Project Specifications
6. Section 5: Vendor Proposal
7. Section 6: Evaluation and Award
8. Certification and Signature Page

SECTION 1: GENERAL INFORMATION

1.1. Introduction:

1. The Marshall University Office of Purchasing (hereinafter referred to as the “Office of Purchasing”) is issuing this solicitation as a request for proposal (“RFP”), as authorized by Marshall University Board of Governors Policy No. FA-9 Purchasing Policy, for the Information Technology department (hereinafter referred to as the “Department”) to provide a MS Teams native contact center solution.

The RFP is a procurement method in which vendors submit proposals in response to the request for proposal published by the Office of Purchasing. It requires an award to the highest scoring vendor, rather than the lowest cost vendor, based upon a technical evaluation of the vendor’s technical proposal and a cost evaluation. This is referred to as a best value procurement. Through their proposals, vendors offer a solution to the objectives, problem, or need specified in the RFP, and define how they intend to meet (or exceed) the RFP requirements.

1.2. RFP Schedule of Events:

RFP Released to Public.....	12/20/2022
Mandatory Pre-bid Conference.....	N/A
Vendor’s Written Questions Submission Deadline	12/29/2022
Addendum Issued.....	1/5/2023
Technical Bid Opening Date.....	1/10/2023
Technical Evaluation Begins.....	1/10/2023
Oral Presentation	1/10/2023 through 1/20/2023
Cost Bid Opening.....	1/20/2023
Cost Evaluation Begins.....	1/20/2023
Contract Award Made.....	1/27/2023

REQUEST FOR PROPOSAL
Marshall University
MU23MSCALLCTR- Microsoft Teams Contact Center Solution

SECTION 2: INSTRUCTIONS TO VENDORS SUBMITTING BIDS

Instructions begin on next page.

Marshall University

INSTRUCTIONS TO VENDORS

1. REVIEW DOCUMENTS THOROUGHLY: Please read these instructions and all documents attached in their entirety. These instructions provide critical information about requirements that if overlooked, could lead to disqualification of a Vendor's bid. All bids must be submitted in accordance with the provisions contained in these instructions and the Solicitation. Failure to do so may result in disqualification of a Vendor's bid.

2. MANDATORY TERMS: The Solicitation may contain mandatory provisions identified by the use of the words "must," "will," and "shall" which identify a mandatory item or requirement. Failure to comply with a mandatory term in the Solicitation will result in bid disqualification.

3. PREBID MEETING: The item identified below shall apply to this Solicitation.

A pre-bid meeting will not be held prior to bid opening.

A **NON-MANDATORY** pre-bid meeting will be held at the following place and time:

A **MANDATORY** pre-bid meeting will be held at the following place and time:

All Vendors submitting a written bid must attend the mandatory pre-bid meeting. Failure to attend the mandatory pre-bid meeting shall result in disqualification of the Vendor's bid. No person attending the pre-bid meeting may represent more than one (1) Vendor.

An attendance sheet provided at the pre-bid meeting shall serve as the official document attendance verification. The State will not accept any other form of proof or documentation to verify attendance. Any person attending the pre-bid meeting on behalf of a Vendor must list his or her name and the name of the Vendor he or she is representing.

Additionally, the person attending the pre-bid meeting should include the Vendor's e-mail address, phone number, and fax number on the attendance sheet. It is the Vendor's responsibility to locate the attendance sheet and provide the required information. **Failure to complete the attendance sheet as required may result in disqualification of Vendor's bid.**

Marshall University

INSTRUCTIONS TO VENDORS

All Vendors should arrive prior to the starting time for the pre-bid. Vendors who arrive after the starting time but prior to the end of the pre-bid will be permitted to sign in, but are charged with knowing all matters discussed at the pre-bid meeting.

If possible, questions submitted at least five (5) business days prior to a scheduled pre-bid meeting will be discussed at the pre-bid meeting. Any discussions or answers to questions at the pre-bid meeting are preliminary in nature and are non-binding. Official and binding answers to questions will be published in a written addendum to the Solicitation prior to bid opening.

- 4. VENDOR QUESTION DEADLINE:** Vendors may submit questions relating to this Solicitation to the Marshall University Office of Purchasing as directed below. Questions must be submitted in writing. All questions must be submitted on or before the date listed below and to the address listed below to be considered. A written response will be published in a Solicitation addendum if a response is possible and appropriate. Non-written discussions, conversations, or questions and answers regarding this Solicitation are preliminary in nature and are nonbinding.

Submissions should include solicitation number in the subject line.

Question Submission Deadline (date and time): **December 29, 2022 3PM EST**

Submit Questions to: Michelle Wheeler- Associate Director of Purchasing
Old Main 125
One John Marshall Drive
Huntington, WV 25755
Fax: (304) 696-3333 (Vendors should not use this fax number for bid submission)
Email: michelle.wheeler@marshall.edu

- 5. VERBAL COMMUNICATION:** Any verbal communication between the Vendor and any State personnel is not binding, including verbal communication at the mandatory pre-bid conference. Only information issued in writing and added to the Solicitation by an official written addendum by the Marshall University Office of Purchasing is binding.
- 6. BID SUBMISSION:** All bids must be submitted electronically through Bonfire™ or signed and delivered by the Vendor to the Marshall University Office of Purchasing at the address listed above on or before the date and time of the bid opening. Any bid received by the Office of Purchasing staff is in the possession of the Office of Purchasing and will not be returned for any reason. The Office of Purchasing will not accept bids, modification of bids, or addendum acknowledgment forms via e-mail. Acceptable delivery methods include electronic submission via Bonfire™, hand delivery, or delivery by courier.

Marshall University

INSTRUCTIONS TO VENDORS

A bid that is not submitted electronically through Bonfire™ should contain the information listed below on the face of the envelope or the bid may be rejected by the University.

SEALED BID: MU23MSCALLCTR

CONTACT: Michelle Wheeler 304.696.2727 or michelle.wheeler@marshall.edu

SOLICITATION NAME: MS TEAMS Native Contact Center Solution

SOLICITATION CLOSING DATE: January 10, 2023

SOLICITATION CLOSING TIME: 2 PM EST

- 7. BID OPENING:** Bids submitted in response to this Solicitation will be opened at the location identified below on the date and time listed below. Delivery of a bid after the bid opening date and time will result in bid disqualification. For purposes of this Solicitation, a bid is considered delivered when confirmation of delivery is provided by Bonfire™ (in the case of electronic submission), when the bid is delivered via mail or courier and time stamped by the official Marshall University Office of Purchasing's time clock or when the bid is delivered and is time stamped by the official Marshall University Office of Purchasing's time clock.

Bid Opening Date and Time: Technical Opening January 10th, 2023 2PM EST.

Cost Opening January 20, 2023 2 PM EST

Bid Opening Location: Marshall University Office of Purchasing
Old Main 125

One John Marshall Drive
Huntington, WV 25755

- 8. ADDENDUM ACKNOWLEDGEMENT:** Changes or revisions to this Solicitation will be made by an official addendum issued by the University. Vendor should acknowledge receipt of all addenda issued with this Solicitation by completing an Addendum Acknowledgment Form, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.
- 9. BID FORMATTING:** Vendor should type or electronically enter the information onto its written bid to prevent errors in the evaluation. Failure to type or electronically enter the information may result in bid disqualification.

Marshall University

INSTRUCTIONS TO VENDORS

- 10. ALTERNATES:** Any model, brand, or specification listed in this Solicitation establishes the acceptable level of quality only and is not intended to reflect a preference for, or in any way favor, a particular brand or Vendor. Vendors may bid alternates to a listed model or brand provided that the alternate is at least equal to the model or brand and complies with the required specifications. The equality of any alternate being bid shall be determined by the University at its sole discretion. Any Vendor bidding an alternate model or brand should clearly identify the alternate items in its bid and should include manufacturer's specifications, industry literature, and/or any other relevant documentation demonstrating the equality of the alternate items. Failure to provide information for alternate items may be grounds for rejection of a Vendor's bid.
- 11. EXCEPTIONS AND CLARIFICATIONS:** The Solicitation contains the specifications that shall form the basis of a contractual agreement. Vendor shall clearly mark any exceptions, clarifications, or other proposed modifications in its bid. Exceptions to, clarifications of, or modifications of a requirement or term and condition of the Solicitation may result in bid disqualification.
- 12. COMMUNICATION LIMITATIONS:** In accordance with Marshall University Board of Governors Policy No. FA-9 Purchasing Policy, communication with Marshall University or any of its employees regarding this Solicitation during the solicitation, bid, evaluation or award periods, except through the Marshall University Office of Purchasing, is strictly prohibited without prior Office of Purchasing approval for such communication.
- 13. REGISTRATION:** Prior to Contract award, the apparent successful Vendor must be properly registered with the West Virginia Purchasing Division and must have paid the registration fee, if applicable.
- 14. UNIT PRICE:** Unit prices shall prevail in cases of a discrepancy in the Vendor's bid.
- 15. PREFERENCE:** Vendor Preference may be requested in purchases of motor vehicles or construction and maintenance equipment and machinery used in highway and other infrastructure projects. Any request for preference must be submitted in writing with the bid, must specifically identify the preference requested with reference to the applicable subsection of West Virginia Code § 5A-3-37, and should include with the bid any information necessary to evaluate and confirm the applicability of the requested preference. A request form to help facilitate the request can be found at: <http://www.state.wv.us/admin/purchase/vrc/Venpref.pdf>. Please Note: Vendor Preference is not applicable to construction projects.
- 15A. RECIPROCAL PREFERENCE:** The State of West Virginia applies a reciprocal preference to all solicitations for commodities and printing in accordance with W. Va. Code § 5A-3-37(b). In effect, if reciprocal preference is requested by a West Virginia resident vendor, non-resident vendors receiving a preference in their home states, will see that same preference granted to West Virginia resident vendors bidding against them in West Virginia. A request form to help facilitate the request can be found at:
<http://www.state.wv.us/admin/purchase/vrc/Venpref.pdf>.

Marshall University

INSTRUCTIONS TO VENDORS

- 16. SMALL, WOMEN-OWNED, OR MINORITY-OWNED BUSINESSES:** For any solicitations publicly advertised for bid, in accordance with West Virginia Code §5A-3-37(a)(7) and W. Va. CSR § 148-22-9, any non-resident vendor certified as a small, women-owned, or minority-owned business under W. Va. CSR § 148-22-9 shall be provided the same preference made available to any resident vendor. Any non-resident small, women-owned, or minority-owned business must identify itself as such in writing, must submit that writing to the Purchasing Division with its bid, and must be properly certified under W. Va. CSR § 148-22-9 prior to contract award to receive the preferences made available to resident vendors. Preference for a non-resident small, women-owned, or minority owned business shall be applied in accordance with W. Va. CSR § 148-22-9.
- 17. WAIVER OF MINOR IRREGULARITIES:** The Chief Procurement Officer reserves the right to waive minor irregularities in bids or specifications in accordance with Marshall University Board of Governors Policy No. FA-9 Purchasing Policy.
- 18. ELECTRONIC FILE ACCESS RESTRICTIONS:** Vendor must ensure that its submission in Bonfire™ can be accessed and viewed by the University staff immediately upon bid opening. The University will consider any file that cannot be immediately access and viewed at the time of the bid opening (such as, encrypted files, password protected files, or incompatible files) to be blank or incomplete as context requires, and therefore unacceptable. A Vendor will not be permitted to unencrypt files, remove password protections, or resubmit documents after bid opening to make a file viewable if those documents are required with the bid. A Vendor may be required to provide document passwords or removed access restrictions to allow the University to print or electronically save documents provided that those documents are viewable by the University prior to obtaining the password or removing the access restriction.
- 19. NON-RESPONSIBLE:** The Chief Procurement Officer reserves the right to reject the bid of any Vendor as Non-Responsible in accordance with Marshall University Board of Governors Policy No. FA-9 Purchasing Policy, when the Chief Procurement Officer determines that the Vendor submitting the bid does not have the capability to fully perform or lacks the integrity and reliability to assure good-faith performance.
- 20. NON-RESPONSIVE:** The Chief Procurement Officer reserves the right to reject the bid of any Vendor as Non-Responsive in accordance with Marshall University Board of Governors Policy No. FA-9 Purchasing Policy, when the Chief Procurement Officer determines that the Vendor submitting the bid does not conform to the mandatory or essential requirements contained in the solicitation.
- 21. ACCEPTANCE/REJECTION:** The University may accept or reject any bid in whole, or in part in accordance with Marshall University Board of Governors Policy No. FA-9 Purchasing Policy.

Marshall University

INSTRUCTIONS TO VENDORS

- 22. YOUR SUBMISSION IS A PUBLIC DOCUMENT:** Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of Marshall University Board of Governors Policy No. FA-9 Purchasing Policy, §5-22-1 et seq., §5G-1-1 et seq., and the West Virginia Freedom of Information Act in W. Va. Code § 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET (S), OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Marshall University Office of Purchasing constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The University may disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by W. Va. Code § 47-22-1 et seq. and subject to W. Va. Code 29B-1-4(a) (1). All submissions are subject to public disclosure without notice.

- 23. PURCHASING AFFIDAVIT:** The University is prohibited from awarding a contract to any bidder that owes a debt to the State or political subdivision of the State. Vendors are required to sign, notarize, and submit the Purchasing Affidavit to the Marshall University Office of Purchasing affirming under oath that it is not in default on any monetary obligation owed to the State or a political subdivision of the State.

<http://www.state.wv.us/admin/purchase/vrc/pAffidavit.pdf>

- 24. INTERESTED PARTY DISCLOSURE:** West Virginia Code § 6D-1-4 requires that the vendor submit to the Marshall University Office of Purchasing a disclosure of interested parties to the contract for all contracts with an actual or estimated value of at least \$1 million. That disclosure must occur on the form prescribed and approved by the WV Ethics Commission prior to contract award. A copy of that form is included with this solicitation or can be obtained from the WV Ethics Commission. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

http://www.state.wv.us/admin/purchase/VRC/Ethics_DisclosureInterestedParties_2018.pdf

- 25. WITH THE BID REQUIREMENTS:** In instances where these specifications require documentation or other information with the bid, and a vendor fails to provide it with the bid, the Chief Procurement Officer reserves the right to request those items after bid opening and prior to contract award pursuant to the authority to waive minor irregularities in bids or specifications under Marshall University Board of Governors Policy No. FA-9 Purchasing Policy. This authority does not apply to instances where state law mandates receipt with the bid.

REQUEST FOR PROPOSAL
Marshall University
MU23MSCALLCTR- Microsoft Teams Contact Center Solution

SECTION 3: GENERAL TERMS AND CONDITIONS

Terms and conditions begin on next page.

MARSHALL UNIVERSITY

GENERAL TERMS AND CONDITIONS

1. CONTRACTUAL AGREEMENT: Issuance of an Award Document constitutes acceptance of this contract (the Contract) made by and between Marshall University (University or Marshall) and the Vendor. The vendor's signature on the Contract signifies Vendor's agreement to be bound by and accept the terms and conditions contained in the Contract. Therefore, the parties agree that the following contractual terms and conditions are dominate over any competing terms made a part of the Contract. **IN THE EVENT OF ANY CONFLICT BETWEEN THE VENDOR'S FORM(S) AND THESE GENERAL TERMS AND CONDITIONS, THESE GENERAL TERMS AND CONDITIONS SHALL CONTROL**

2. DEFINITIONS: As used in this Solicitation/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications, if applicable, included with the Solicitation/Contract.

2.1 "Award Document" means the document that identifies the Vendor as the Contract holder when signed by the Vendor and Marshall University's Office of Purchasing and, when necessary, approved as to form by the Attorney General.

2.2 "Bid" or "Proposal" means the Vendor's verbal or written bid provided in response to a solicitation by the University.

2.3 "Board" means the Governing Board of Marshall University.

2.4 "Buyer" means an individual designated by a Chief Procurement Officer to perform designated purchasing and acquisition functions as authorized by the Chief Procurement Officer.

2.5 "Chief Procurement Officer" means the individual designated by the President of Marshall University to manage, oversee and direct the purchasing and acquisition of supplies, equipment, services, and printing for the University.

2.6 "Contract" means the binding agreement that is entered between the University and the Vendor to provide requested goods and/or services requested in the Solicitation.

2.7 "Governing Board" means the Marshall University Board of Governors as provided for in the West Virginia state code.

2.8 "Higher Education Institution" means an institution as defined by Sections 401(f), (g), and (h) of the federal Higher Education Facilities Act of 1963, as amended.

2.9 "Office of Purchasing" means the section within Marshall University headed by the Chief Procurement Officer and its personnel.

Revised: 10/12/21

Marshall University General Terms and Conditions

Any language that seeks to automatically renew, modify, or extend the Contract beyond the initial term or automatically continue the Contract period from term to term is deleted. The Contract may be renewed or continued only upon mutual written agreement of the Parties.

Alternate Renewal Term – This contract may be renewed for _____ successive _____ year periods or shorter periods provided that they do not exceed the total number of months contained in all available renewals. Automatic renewal of this Contract is prohibited. The Vendor and Agency must approve renewals.

Fixed Period Contract: The Contract becomes effective upon Vendor’s receipt of the notice to proceed and must be completed within _____.

Fixed Period Contract with Renewals: The Contract becomes effective upon the Vendor’s receipt of the notice to proceed, and part of the Contract must be completed within _____ days. Upon completion, the Vendor agrees that maintenance, monitoring, or warranty services will be provided for _____ successive one-year periods or multiple periods of less than one year, provided that the multiple renewal periods do not exceed months in total.

One-Time Purchase: The term of the Contract shall run from the issuance of the Award Document until all the goods contracted have been delivered, but in no event will the Contract extend for more than one fiscal year.

Other: See attached.

4. NOTICE TO PROCEED: Vendor shall begin the performance of the Contract immediately upon receiving notice to proceed unless otherwise instructed by the University. Unless otherwise specified, the fully executed Award Document will be considered notice to proceed.

5. QUANTITIES: The quantities required under the Contract shall be determined in accordance with the category identified as applicable to the Contract below.

Open End Contract: Quantities stated in the solicitation are approximations only, based on estimates supplied by the University. It is understood and agreed that the Contract shall cover the quantities ordered for delivery during the Contract term, whether more or less than the quantities shown.

Service: The scope of the service will be more clearly defined in the specifications included herewith.

Combined Service and Goods: The scope of the service and deliverable goods will be more clearly defined in the specifications included herewith.

Revised: 10/12/21

Marshall University General Terms and Conditions

- One-Time Purchase:** The Contract is for purchasing a set quantity of goods identified in the specifications included herewith. Once those items have been delivered, no additional goods may be procured under the Contract without an appropriate change order approved by the Vendor, University, and/or, when necessary, the Attorney General's office.

6. EMERGENCY PURCHASES: The Chief Procurement Officer may suspend the use of a wide university-wide mandatory contract (the University's Office of Purchasing has created standard specifications that establish University-wide contracts for commonly used commodities and services that are needed on a repetitive basis), or the competitive bidding process to a Department to purchase goods or services in the open market if for immediate or expedited delivery in an emergency.

Emergencies shall include but are not limited to, delays in transportation or an unanticipated increase in the volume of work, provided that a required University emergency purchase with another vendor does not cause a breach of contract.

7. REQUIRED DOCUMENTS: All the items checked below must be provided to the University by the Vendor as specified below.

BID BOND (Construction Only): Pursuant to the requirements contained in W. Va. Code § 5-22-1(c), All Vendors submitting a bid on a construction project shall furnish a valid bid bond in the amount of five percent (5%) of the total amount of the bid protecting the State of West Virginia. The bid bond must be submitted with the bid.

PERFORMANCE BOND: The apparent successful Vendor shall provide a performance bond for 100% of the contract. The Marshall University Office of Purchasing Office must receive the performance bond before Contract award.

LABOR/MATERIAL PAYMENT BOND: The apparent successful Vendor shall provide a labor/material payment bond for 100% of the Contract value. The labor/material payment bond must be received by the Marshall University Office of Purchasing Office before Contract award.

MAINTENANCE BOND: The successful Vendor shall provide a two (2) year maintenance bond covering the roofing system. The maintenance bond must be issued and received by the Marshall University Office of Purchasing Office before the Contract award.

LICENSE(S) / CERTIFICATIONS / PERMITS: In addition to anything required under the Section entitled Licensing of the General Terms and Conditions, the Vendor shall furnish proof of the following licenses, certifications, and/or permits before Contract award, in a form acceptable to the University.

INSERT ADDITIONAL CONDITIONS BELOW:

Revised: 10/12/21

Marshall University General Terms and Conditions

The apparent successful Vendor shall also furnish proof of any additional licenses or certifications before Contract award regardless of whether that requirement is listed above.

8. INSURANCE: The Vendor shall furnish proof of the insurance identified by a checkmark below before Contract award. Subsequent to contract award and to before the insurance expiration date, the Vendor shall provide the University with proof that the insurance mandated herein has been continued. , The vendor must also provide immediate notice of any changes in its insurance policies mandated herein, including but not limited to policy cancelation, policy reduction, or change in insurers. The insurance coverages identified below must be maintained throughout the life of the contract. The Vendor shall also furnish proof of any additional insurance requirements before the Contract award regardless of whether that insurance requirement is listed in this section.

Any provisions requiring the University to maintain any type of insurance for either its or the Vendors benefit is deleted.

The vendor, must maintain:

Commercial General Liability Insurance in at least an amount of: \$1,000,000 per occurrence and an aggregate of \$2,000,000.

Automobile Liability Insurance in at least an amount of: \$1,000,000 per occurrence and an aggregate of \$2,000,000.

Professional/Malpractice/Errors and Omission Insurance in at least an amount of: _____ per occurrence and an aggregate of _____.

Commercial Crime and Third-Party Fidelity Insurance in an amount of: _____ per occurrence and an aggregate of _____.

Cyber Liability Insurance in an amount of: \$1,000,000 per occurrence and an aggregate of \$2,000,000. Coverage shall be sufficiently broad to respond to the duties and obligations undertaken by Vendor in the performance of the Contract. It shall include, but not limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, the release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs, regulatory fines penalties, regulatory fines and penalties, regulatory fines and penalties, and credit monitoring expenses with limits sufficient to respond to these obligations.

Builders Risk Insurance in an amount equal to 100% of the amount of the Contract. _____ per occurrence and an aggregate of _____.

Revised: 10/12/21

Marshall University General Terms and Conditions

9. WORKERS' COMPENSATION INSURANCE: The apparent successful Vendor shall comply with laws relating to workers' compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request.

10. LIQUIDATED DAMAGES: This clause shall in no way be considered exclusive and shall not limit the University's right to pursue any other available remedy. , The vendor, shall pay liquidated damages in the amount specified below or as described in the specifications:

_____ for _____

Liquidated Damages Contained in the Specifications

11. ACCEPTANCE: Vendor's signature on the certification and signature page constitutes an offer to the University that cannot be unilaterally withdrawn, and signifies that the product or service proposed by Vendor meets the mandatory requirements for that product or service, unless otherwise indicated, and signifies acceptance of the terms and conditions unless stated otherwise.

12. STATUTE OF LIMITATIONS - Any clauses limiting the time the State may bring suit against the Vendor or any other third party are deleted.

13. PRICING/BEST PRICE GUARANTEE: The pricing set forth herein is firm for the life of the Contract unless specified elsewhere within this Solicitation by the University. A Vendor's inclusion of price adjustment provisions in its bid, without express authorization in the Solicitation, may result in bid disqualification. Notwithstanding the foregoing, the Vendor must extend any publicly advertised sale price to the University and invoice at the lower of the contract price or the publicly advertised sale price.

14. PAYMENT IN ARREARS: Payments for goods/services will be made in arrears only upon receipt of a proper invoice detailing the goods/services provided or receipt of the goods/services, whichever is later. Notwithstanding the foregoing, payments for software licenses, subscriptions, or maintenance may be paid annually in advance.

15. PAYMENT METHODS: The Vendor must accept payment by electronic funds transfer or P-Card for payment of all orders under this Contract unless the box below is checked.

The vendor is not required to accept the State of West Virginia's P-Card or by electronic funds transfer as payment for all goods and services for the reason(s) stated below:

16. ADDITIONAL FEES: The vendor is not permitted to charge additional fees or assess additional

Revised: 10/12/21

Marshall University General Terms and Conditions

charges that were not either expressly included in the unit price or lump sum bid amount that the solicitation requires Vendor requires the Vendor to provide. Requesting such fees or charges be paid after the contract has been awarded may result in the cancellation of the contract. Any references contained in the Contract, Vendor's bid, or in any American Institute of Architects documents obligating the University to pay to compensate Vendor, in whole or in part, for lost profit, pay a termination fee, pay liquidated damages if the Contract is terminated early, seeking to accelerate payments in the event of Contract termination, default, or non-funding, costs of collection, court costs, or attorney's fees, unless ordered by a court of competent jurisdiction is hereby deleted. Any language imposing interest or charges due to late payment is deleted.

17. FEES OR COSTS: Any language obligating the State to pay costs of collection, court costs, or attorney's fees, unless ordered by a court of competent jurisdiction, is deleted.

18. RISK SHIFTING: Any provision requiring the State to bear the costs of all or a majority of business/legal risks associated with this Contract, to indemnify the Vendor, or hold the Vendor or a third party harmless for any act or omission is hereby deleted.

19. LIMITING LIABILITY: Any language limiting the Vendor's liability for direct damages is deleted.

20. TAXES: The Vendor shall pay any applicable sales, use, personal property, or other taxes arising from the Contract and the transactions contemplated hereby. The University is exempt from federal and state taxes and will not pay or reimburse such taxes. The University will, upon request, provide a tax-exempt certificate to confirm its tax-exempt status.

21. FISCAL YEAR FUNDING: The Contract shall continue for the term stated herein, contingent upon funds being appropriated by the WV Legislature or otherwise be made available for this Contract. In the event funds are not appropriated or otherwise available, the Contract becomes of no effect and is null and void after June 30 of the current fiscal year. If that occurs, the University may notify the Vendor that an alternative funding source has been obtained and thereby avoid the automatic termination. Non-appropriation or non-funding shall not be considered an event of default.

22. CANCELLATION/RIGHT TO TERMINATE: The University reserves the right to cancel/terminate the Contract immediately upon written notice to the Vendor if the materials or workmanship supplied do not conform to the specifications in the Contract. The University may also cancel any purchase or Contract upon thirty (30) days' written notice to the Vendor. In the event of early cancellation, the University agrees to pay the Vendor only for all undisputed services rendered or goods received before the termination's effective date. All provisions delete are deleted that seek to require the State to (1) compensate Vendor, in whole or in part, for loss profit, (2) pay a termination fee, or (3) pay liquidated damages if the Contract is terminated early.

In the event that a vendor fails to honor any contractual term or condition, the Chief Procurement Officer may cancel the contract and re-award the contract to the next lowest responsible and responsive bidder in accordance with the Marshall University Board of Governors Policy No. FA-9 Purchasing Policy, section 7.4.1 Any language seeking to accelerate payments in the event of Contract termination, default, or non-funding is

Revised: 10/12/21

Marshall University General Terms and Conditions

hereby deleted.

23. RIGHT OF FIRST REFUSAL Any language seeking to give the Vendor a Right of First Refusal is hereby deleted.

24. DISPUTES – Any language binding the University to any arbitration or the decision of any arbitration board, commission, panel, or other entity is deleted, as is any requirement to waive a jury trial.

Any language requiring or permitting disputes under this Contract to be resolved in the courts of any state other than the State of West Virginia is deleted. All legal actions for damages brought by the Vendor against the University shall be brought in the West Virginia Legislative Claims Commission. Other causes of action must be brought in the West Virginia Court authorized by statute to exercise jurisdiction over it.

Any language requiring the State to agree to, or be subject to, any form of equitable relief not authorized by the Constitution or laws of the State of West Virginia is deleted.

25. TIME: Time is of the essence with regard to all matters of time and performance in the Contract.

26. DELIVERY -All deliveries under the Contract will be FOB destination unless the State expressly and knowingly agrees otherwise. Any contrary delivery terms are hereby deleted.

27. APPLICABLE LAW: The Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution, W. Va. Code, or Marshall University Board of Governors Policy No. FA-9 Purchasing Policy is void and of no effect. Any language requiring the application of the law of any state other than the State of West Virginia in interpreting or enforcing the Contract is deleted. The Contract shall be governed by the laws of the State of West Virginia

28. COMPLIANCE WITH GOVERNING LAWS: Vendor shall comply with all applicable federal, state, and local laws, regulations, and ordinances. By submitting a bid, the Vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances. , The vendor, shall notify all subcontractors who are providing commodities or services related to this Contract that, as subcontractors, they too are required to comply with all applicable laws, regulations, and ordinances.

29. ARBITRATION: Any references made to arbitration contained in the Contract, Vendor's bid, or in any American Institute of Architects documents pertaining to the Contract are hereby deleted, void, and of no effect.

30. MODIFICATIONS: Notwithstanding anything contained in the Contract to the contrary, no modification of the Contract shall be binding without the mutual written consent of the University and the Vendor.

31. AMENDMENTS - The parties agree that all amendments, modifications, alterations, or changes to the Contract shall be by mutual agreement, in writing, and signed by both parties. Any language to the contrary is deleted.

32. NO WAIVER: The failure of either party to insist upon strict performance of any of the terms or provisions

Revised: 10/12/21

Marshall University General Terms and Conditions

of the Contract or to exercise any option, right, or remedy herein contained, shall not be construed as a waiver or a relinquishment for the future of such term, provision, option, right, or remedy, but the same shall continue in full force and effect. Any waiver must be expressly stated in writing and signed by the waiving party.

Any provisions requiring the University to waive any rights, claims, or defenses are hereby deleted.

33. SUBSEQUENT FORMS: The terms and conditions contained in the Contract shall supersede any and all subsequent terms and conditions which may appear on any form documents submitted by the Vendor to the University, such as price lists, order forms, invoices, sales agreements, or maintenance agreements, and includes internet websites or other electronic documents. Acceptance or use of Vendor's forms does not constitute acceptance of the terms and conditions contained thereon.

34. ASSIGNMENT: Neither the Contract nor any monies due or to become due hereunder may be assigned by the Vendor without the express written consent of the University and any other government or office that may be required to approve such assignments.

The Vendor agrees not to assign the Contract to any person or entity without the State's prior written consent, which will not be unreasonably delayed or denied. The State reserves the right to assign this Contract to another State agency, board, or commission upon thirty (30) days of written notice to the Vendor. These restrictions do not apply to the payments made by the State. Any assignment will not become effective and binding upon the State until the State is notified of the assignment and the State and Vendor execute a change order to the Contract.

35. WARRANTY: The Vendor expressly warrants that the goods and/or services covered by the Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the University; (b) be merchantable and fit for the purpose intended, and (c) be free from defect in material and workmanship.

36. UNIVERSITY EMPLOYEES: University employees are not permitted to utilize the Contract for personal use, and the Vendor is prohibited from permitting or facilitating the same.

37. PRIVACY, SECURITY, AND CONFIDENTIALITY: The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the University unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the University's policies, procedures, and rules.

Proposals are NOT to be marked as confidential or proprietary Any Provisions regarding confidential treatment or non-disclosure of the terms and conditions of the Contract are ,at this moment, deleted. State contracts are public records under the West Virginia Freedom of Information Act ("FOIA") (W.Va. Code §29B-1-1, et. seq.) and public procurement laws. This Contract and other public records may be disclosed without notice to the vendor at the University's sole discretion. The University shall not be liable in any way for disclosure of any such records.

Any provisions regarding confidentiality of or non-disclosure related to contract performance are only effective to the extent they are consistent with FOIA and incorporated into the Contract through a separately approved and

Revised: 10/12/21

Marshall University General Terms and Conditions

signed non-disclosure agreement.

38. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of W. Va. Code §18B-5-4 and the Freedom of Information Act in W.Va. Code Chapter 29B.

**DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL,
CONTAINING A TRADE SECRET(S), OR IS OTHERWISE NOT SUBJECT TO
PUBLIC DISCLOSURE.**

Submission of any bid, proposal or other document to the Marshall University Office of Purchasing constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document.

39. LICENSING: Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local University of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state University or political subdivision. Upon request, the Vendor must provide all necessary releases to obtain information to enable the University to verify that the Vendor is licensed and in good standing with the above entities.

40. ANTITRUST: In submitting a bid to, signing a contract with, or accepting an Award Document from Marshall University, the Vendor agrees to convey, sell, assign, or transfer to the University all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by Marshall University. Such assignment shall be made and become effective at the time the University tenders the initial payment to Vendor.

41. THIRD-PARTY SOFTWARE: If this Contract contemplates or requires the use of third-party software, the vendor represents that none of the mandatory through click-throughs, unsigned, or web-linked terms and conditions presented or required before using such third-party software conflict with any term of this Addendum or that has the authority to modify such third-party software's terms and conditions to be subordinate to this Addendum. The Vendor shall indemnify and defend the State against all claims resulting from an assertion that such third-party terms and conditions are not in accord with, or subordinate to, this Addendum.

42. RIGHT TO REPOSSESSION NOTICE: Any provision for repossession of equipment without notice is hereby deleted. However, the State does recognize a right of repossession with notice.

43. VENDOR CERTIFICATIONS: By signing its bid or entering into the Contract, the Vendor certifies (1) that its bid or offer was made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, person or entity submitting a bid or offer for the same material, supplies, equipment or services; (2) that its bid or offer is in all respects fair and without collusion or fraud; (3) that the Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; and (4) that it has reviewed the Contract in its entirety; understands

Revised: 10/12/21

Marshall University General Terms and Conditions

the requirements, terms, and conditions, and other information contained herein. The vendor's signature on its bid or offer also affirms that neither it nor its representatives have any interest, nor shall acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the University. The individual signing this bid or offer on behalf of the Vendor certifies that they are Vendor Vendor authorizes them to execute this bid or offer or any documents related thereto on Vendor's behalf; that they are authorized to bind the Vendor in a contractual relationship; and that, to the best of her her their knowledge, the Vendor has properly registered with all State agencies as required.

44. VENDOR RELATIONSHIP: The Vendor Vendor's relationship to the University shall be that of an independent contractor, and no principal-agent or employer-employee relationship is contemplated or created by the Contract. The Vendor, as an independent contractor, is solely liable for the acts and omissions of its employees and agents. Vendor vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this Solicitation and the resulting contract. Neither the Vendor nor any employees or subcontractors of the Vendor, shall be deemed employees of the University for any purpose whatsoever. The vendor shall be exclusively responsible for the payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing. The vendor shall hold the State harmless and shall provide the State and University with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

45. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the University, their officers, and employees from and against (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but limited to, labor and wage, and hour laws.

46. PURCHASING AFFIDAVIT: In accordance with West Virginia Code § 18B-5-5 and §5A-3-18, the University is prohibited from awarding a contract to any bidder that owes a debt to the State or a political subdivision of the State; vendors are required to sign, notarize, and submit the Purchasing Affidavit to the Marshall University Office of Purchasing affirming under oath that it is not in default on any monetary obligation owed to the state or a political subdivision of the state.

47. WEST VIRGINIA DRUG-FREE WORKPLACE CONFORMANCE AFFIDAVIT West Virginia Alcohol and Drug-Free Workplace Act requires public improvement contractors to have and implement a drug-free workplace policy that requires drug and alcohol testing. This act applies to any construction, reconstruction, improvement, enlargement, painting, decorating, or repair of any public improvement let to a contract for which the contract value is is, the is over \$100,000. No public authority may award a public improvement contract which is to be let to bid to a contractor unless the terms of the contract require the contractor and its subcontractors to implement and maintain a written drug-free workplace policy and the

Revised: 10/12/21

Marshall University General Terms and Conditions

contractor and its subcontractors provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free workplace policy.

48. DISCLOSURE OF INTERESTED PARTIES A state agency may not enter into a contract, or a series of related contracts, that has/have an actual or estimated value of \$1,000,000 or more until the business entity submits to the contracting state agency a Disclosure of Interested Parties to the applicable contract.

49. CONFLICT OF INTEREST: Vendor, its officers, members, or employees shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. , The vendor, shall periodically inquire of its officers, members, and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to the University.

50. MARSHALL UNIVERSITY'S INFORMATION TECHNOLOGY SERVICES AND SUPPORT DEPARTMENT (IT) FEES: If a vendor requires services through Marshall University's IT Department, they must reimburse the University at the IT Rate Schedule, which is located at: <https://www.marshall.edu/it/rates/>.

51. PUBLICITY: Vendor shall not, in any way or in any form, publicize or advertise the fact that Vendor is supplying goods or services to the University without the express written consent of the Marshall University Communications Department. Requests should be sent to ucomm@marshall.edu.

52. UNIVERSITY MARKS: Vendor shall not, in any way or any form, use the University's trademarks or other intellectual property without the express written consent of the Marshall University Communications Department. Requests should be sent to ucomm@marshall.edu.

53. INTELLECTUAL PROPERTY: The University will own all rights, title, and interest in any and all intellectual property rights created in the performance or otherwise arising out of the agreement, and the Vendor will execute any assignments of other documents necessary for the University to perfect such rights, provided that, for research collaboration pursuant to subcontracts under sponsored research agreements, intellectual property rights will be governed by the terms of the grant or contract to the University to the extent such intellectual property terms to apply to subcontractors.

54. FERPA: , The vendor, agrees to abide by the Family Education Rights and Privacy Act of 1974 ("FERPA). To the extent that Vendor receives personally identifiable information from education records as defined in (FERPA), Vendor agrees to abide by the limitations on re-disclosure set forth ,which states that the officers, employees, and agents of a party that receives education record information from Marshall may use the information, but only for the purposes for which the disclosure was made.

Revised: 10/12/21

Marshall University General Terms and Conditions

55. REPORTS: , The vendor, shall provide the University with the following reports identified by a checked box below:

- Such reports as the University may request. Requested reports may include, but are not limited to, quantities purchased, agencies utilizing the contract, total contract expenditures by University, etc.
- Quarterly reports detailing the total quantity of purchases in units and dollars, along with a listing of purchases by the University.

56. PREFERENCE FOR THE USE OF DOMESTIC STEEL PRODUCTS IN STATE CONTRACT PROJECTS: Pursuant to W.Va. Code §5A-3-56, (a)(1) Except when authorized pursuant to the provisions of subsection (b) of this section, no contractor may use or supply steel products for a state contract project other than those steel products made in the United States. A contractor who uses steel products in violation of this section may be subject to civil penalties pursuant to W.Va. Code §5A-3-56. As used in this section (2):

(A) "State contract project" means any erection or construction of, or any addition to, alteration of, or other improvement to any building or structure, including, but not limited to, roads or highways, or the installation of any heating or cooling or ventilating plants or other equipment, or the supply of any materials for such projects, pursuant to a contract with the State of West Virginia for which bids were solicited on or after the effective date of this section on or after June 6, 2001.

(B) "Steel products" means products rolled, formed, shaped, drawn, extruded, forged, cast, fabricated, or otherwise similarly processed, or processed by a combination of two or more of such operations, from steel made by the open hearth, basic oxygen, electric furnace, Bessemer or other steel making process.

(b) Notwithstanding any provision of subsection (a) of this section to the contrary, the Director of the West Virginia Department of Administration, Purchasing Division ("Director of the Purchasing Division") may, in writing, authorize the use of foreign steel products if:

(1) The cost for each contract item used does not exceed one tenth of one percent of the total contract cost or \$2,500, whichever is greater. For the purposes of this section, the cost is the value of the steel product as delivered to the project; or

(2) The Director of the Purchasing Division determines that specified steel materials are not produced in the United States in sufficient quantity or otherwise are not reasonably available to meet contract requirements.

57. PREFERENCE FOR DOMESTIC ALUMINUM, GLASS, AND STEEL PRODUCTS:

In Accordance with W. Va. Code § 5-19-1 et seq.,

(a) Every state spending unit, as defined in chapter five-a, shall require that every contract or subcontract for the construction, reconstruction, alteration, repair, improvement or maintenance of public works or for the purchase of any item of machinery or equipment to be used at sites of public works contain a provision that, if any aluminum, glass or steel products are to be supplied in the performance of the contract, or subcontract, only domestic aluminum, glass or steel products shall be supplied unless the spending officer, as defined in chapter five-a, determines, in writing, after the receipt of offers or bids, that the cost of domestic aluminum, glass or steel products is unreasonable or inconsistent with the public interest or that domestic aluminum, glass or steel products are not produced in sufficient quantities to meet the contract requirements: Provided,

Revised: 10/12/21

Marshall University General Terms and Conditions

DESIGNATED CONTACT: The vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to the Contract.

(Name, Title)

(Printed Name and Title)

(Address)

(Phone Number) (Fax Number)

(Email Address)

CERTIFICATION AND SIGNATURE: By signing below, I certify that I have reviewed this Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that the product or service proposed meets the mandatory requirements contained in the Contract for that product or service, unless otherwise stated herein; that the Vendor expressly accepts the terms and conditions contained in the Contract; **that Vendor understands and acknowledges that the terms and conditions contained in this contract take precedence over and any terms and conditions that Vendor seeks to be made a part of this contract (regardless of when the terms and conditions become effective) to the extent there is a conflict;** that I am authorized by the Vendor to execute and submit this Contract or any documents related thereto on Vendor's behalf; that I am authorized to bind the Vendor in a contractual relationship; and that to the best of my knowledge, the Vendor has/will properly register with the WV Purchasing Division and Marshall University.

(Company)

(Authorized Signature)

(Printed Name and Title of Authorized Representative)

(Phone Number) (Fax Number)

Revised: 7/15/21

Marshall University General Terms and Conditions

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

SECTION 4: PROJECT SPECIFICATIONS

4.1. Background and Current Operating Environment: Marshall University is seeking to replace an antiquated contact center solution for a Microsoft Teams native solution supporting customer service departments including Information Technology, Admissions, Registrar, Financial Aid, Bursar, and others throughout the University's campus. In addition, the contact center will also be deployed in patient clinic locations of Marshall Health and Marshal Health Information Technology service desk.

4.2. Project Goals and Mandatory Requirements: Marshall University's current call center contract ends April 30, 2023 and must be replaced by an MS Teams native contact center by that point. Vendor should describe its approach and methodology to providing the service or solving the problem described by meeting the goals/objectives identified below. Vendor's response should include any information about how the proposed approach is superior or inferior to other possible approaches.

4.2.1. Goals and Objectives – The project goals and objectives are listed below.

4.2.1.1 Call center solution must support an MS Teams native environment.

4.2.1.2 Call center solution must be implemented by April 30, 2023.

4.2.1.3 Call center solution must provide adequate training.

4.2.1.4 Call center solution must meet the requirements as described in Section 4.2.2.

4.2.2. Mandatory Project Requirements – The following mandatory requirements relate to the goals and objectives and must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it will comply with the mandatory requirements and include any areas where its proposed solution exceeds the mandatory requirement. Failure to comply with mandatory requirements will lead to disqualification, but the approach/methodology that the vendor uses to comply, and areas where the mandatory requirements are exceeded, will be included in technical scores where appropriate. The mandatory project requirements are listed below.

4.2.2.1 Call center solution must support an MS Teams native environment.

4.2.2.2 Call center solution must have a robust reporting capability including reports by day, by week (or other timeframes), trending reports, answered, abandoned, directed to voicemail, etc.

4.2.2.3 Call center solution must be able to report how many agents are currently on calls (through a dashboard interface).

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

4.2.2.4 Call center solution shall provide agent training functionalities including the ability for an agent to join a call without being heard by the caller, as well as the ability for an agent to take over a call immediately. - OPTIONAL

4.2.2.5 Call center solution shall have the ability to record a call. - OPTIONAL

4.2.2.6 Ideally, the call center solution shall be HIPAA compliant, or the vendor would be willing to execute a Business Associate Agreement (BAA) - OPTIONAL

4.2.2.7 Call center solution shall have the ability to be integrated into the following third-party solutions: - OPTIONAL

- i. Active directory
- ii. Banner
- iii. Cerner
- iv. ServiceNow
- v. Customer Relationship Management systems

4.2.2.8 Call center solution shall utilize integrated data to recognize incoming calls from students and other university stakeholders, as well as provide insights on the number of times that user has called. - OPTIONAL

4.2.2.9 Call center solution should provide the capability for queuing based on multiple phone numbers.

4.2.2.10 Call center solution should be able to forward messages to voicemails based on specific time periods (i.e., holidays, etc.).

4.2.2.11 Call center solution shall include a chat solution (i.e., chat bot, live agent chat, etc.). - OPTIONAL

4.2.2.12 Call center solution shall integrate with Microsoft Teams availability status. - OPTIONAL

4.2.2.13 Call center solution should have the ability to route calls (i.e., first come first served, round robin, etc.).

4.3. Qualifications and Experience: Vendor should provide information and documentation regarding its qualifications and experience in providing services or solving problems like those requested in this RFP. Information and documentation should include, but is not limited to, copies of any staff certifications or degrees applicable to this project, proposed staffing plans, descriptions of past projects completed (descriptions should include the location of the project, project manager name and contact information, type of project, and what the project goals and objectives were and how they

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

were met.), references for prior projects, and any other information that vendor deems relevant to the items identified as desirable or mandatory below.

4.3.1. Qualification and Experience Information: Vendor should describe in its proposal how it meets the desirable qualification and experience requirements listed below.

4.3.1.1. At least one implementation in an MS Teams environment serving a health care customer.

4.3.1.2. At least one implementation in an MS Teams environment service a higher education customer.

4.3.2. Mandatory Qualification/Experience Requirements – The following mandatory qualification/experience requirements must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it meets the mandatory requirements and include any areas where it exceeds the mandatory requirements. Failure to comply with mandatory requirements will lead to disqualification, but areas where the mandatory requirements are exceeded will be included in technical scores where appropriate. The mandatory qualifications/experience requirements are listed below.

4.3.2.1. Please see above section (4.3.1) for mandatory requirements.

4.4. Oral Presentations (Department Option): The Department has the option of requiring oral presentations of all Vendors participating in the RFP process. If this option is exercised, it would be listed in the Schedule of Events (Section 1.2) of this RFP. During oral presentations, Vendors may not alter or add to their submitted proposal, but only clarify information. A description of the materials and information to be presented is provided below:

Materials and Information Requested at Oral Presentation:

4.4.1. Demonstration of all requirements listed in previous sections;

4.4.2. Implementation plan and timeline;

4.4.3. Examples of previous implementations;

4.4.4. Cost.

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

SECTION 5: VENDOR PROPOSAL

- 5.1. Economy of Preparation:** Proposals should be prepared simply and economically providing a concise description of the items requested in Section 4. Emphasis should be placed on completeness and clarity of the content.
- 5.2. Incurring Cost:** Neither the State nor any of its employees or officers shall be held liable for any expenses incurred by any Vendor responding to this RFP, including but not limited to preparation, delivery, or travel.
- 5.3. Proposal Format:** Vendors should provide responses in the format listed below:
- 5.3.1. Two-Part Submission:** Vendors must submit proposals in two distinct parts: technical and cost. Technical proposals must not contain any cost information relating to the project. Cost proposal must contain all cost information and must be sealed in a separate envelope from the technical proposal to facilitate a secondary cost proposal opening.
 - 5.3.2. Title Page:** State the RFP subject, number, Vendor's name, business address, telephone number, fax number, name of contact person, e-mail address, and Vendor signature and date.
 - 5.3.3. Table of Contents:** Clearly identify the material by section and page number.
 - 5.3.4. Response Reference:** Vendor's response should clearly reference how the information provided applies to the RFP request. For example, listing the RFP number and restating the RFP request as a header in the proposal would be considered a clear reference.
 - 5.3.5. Proposal Submission:** All proposals must be submitted to the Office of Purchasing **prior** to the date and time stipulated in the RFP as the opening date. All submissions must be in accordance with the provisions listed in Section 2: Instructions to Bidders Submitting Bids.

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

SECTION 6: EVALUATION AND AWARD

- 6.1. Evaluation Process:** Proposals will be evaluated in two parts by a committee of three (3) or more individuals. The first evaluation will be of the technical proposal and the second is an evaluation of the cost proposal. The Vendor who demonstrates that it meets all the mandatory specifications required, attains the minimum acceptable score and attains the highest overall point score of all Vendors shall be awarded the contract.
- 6.2. Evaluation Criteria:** Proposals will be evaluated based on criteria set forth in the solicitation and information contained in the proposals submitted in response to the solicitation. The technical evaluation will be based upon the point allocations designated below for a total of (seventy) 70 of the one hundred (100) points. Cost represents thirty (30) of the one hundred (100) total points.

Evaluation Point Allocation:

Project Goals and Proposed Approach (§ 4.2)

- Approach & Methodology to Goals/Objectives (§ 4.2.1) (17) Points Possible
- Approach & Methodology to Compliance with Mandatory Project Requirements (§ 4.2.2) (38) Points Possible

Qualifications and experience (§ 4.3)

- Qualifications and Experience Generally (§ 4.3.1) (10) Points Possible

(Oral interview, if applicable) (§ 4.4)

(5) Points Possible

Total Technical Score:

70 Points Possible

Total Cost Score:

30 Points Possible

Total Proposal Score: 100 Points Possible

- 6.3. Technical Bid Opening:** At the technical bid opening, the Office of Purchasing will open and announce the technical proposals received prior to the bid opening deadline. Once opened, the technical proposals will be provided to the Department evaluation committee for technical evaluation.

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

6.4. Technical Evaluation: The Department evaluation committee will review the technical proposals, assign points where appropriate, and make a final written recommendation to the Office of Purchasing.

6.5. Proposal Disqualification:

6.5.1. Minimum Acceptable Score (“MAS”): Vendors must score a minimum of seventy (70) percent (forty-nine (49) points) of the total technical points possible in order to move past the technical evaluation and have their cost proposal evaluated. All vendor proposals not attaining the MAS will be disqualified.

6.5.2. Failure to Meet Mandatory Requirement: Vendors must meet or exceed all mandatory requirements in order to move past the technical evaluation and have their cost proposals evaluated. Proposals failing to meet one or more mandatory requirements of the RFP will be disqualified.

6.6. Cost Bid Opening: The Office of Purchasing will schedule a date and time to publicly open and announce cost proposals after technical evaluation has been completed and the Office of Purchasing has approved the technical recommendation of the evaluation committee. All cost bids received will be opened. Cost bids for disqualified proposals will be opened for record keeping purposes only and will not be evaluated or considered. Once opened, the cost proposals will be provided to the Department evaluation committee for cost evaluation.

The Office of Purchasing reserves the right to disqualify a proposal based upon deficiencies in the technical proposal even after the cost evaluation.

6.7. Cost Evaluation: The Department evaluation committee will review the cost proposals, assign points in accordance with the cost evaluation formula contained herein and make a final recommendation to the Office of Purchasing.

Cost Evaluation Formula: Each cost proposal will have points assigned using the following formula for all Vendors not disqualified during the technical evaluation. The lowest cost of all proposals is divided by the cost of the proposal being evaluated to generate a cost score percentage. That percentage is then multiplied by the points attributable to the cost proposal to determine the number of points allocated to the cost proposal being evaluated.

Step 1: $\text{Lowest Cost of All Proposals} / \text{Cost of Proposal Being Evaluated} = \text{Cost Score Percentage}$

Step 2: $\text{Cost Score Percentage} \times \text{Points Allocated to Cost Proposal} = \text{Total Cost Score}$

Example:

Proposal 1 Cost is \$1,000,000
Proposal 2 Cost is \$1,100,000
Points Allocated to Cost Proposal is 30

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

Proposal 1: Step 1 – $\$1,000,000 / \$1,000,000 =$ Cost Score Percentage of 1 (100%)
Step 2 – $1 \times 30 =$ Total Cost Score of 30

Proposal 2: Step 1– $\$1,000,000 / \$1,100,000 =$ Cost Score Percentage of 0.909091 (90.9091%)
Step 2 – $0.909091 \times 30 =$ Total Cost Score of 27.27273

6.8. Availability of Information: Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder’s behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State Department that may require registration.

(Company)

(Representative Name, Title)

(Contact Phone/Fax Number)

(Date)

REQUEST FOR PROPOSAL
Marshall University
MU23MSCALLCTR- MS Teams Contact Center Solution

Attachment A: Cost Sheet

Attachment A: Cost Sheet

Bidding companies should provide the following costs for project implementation (to include planning and service design, training, etc.), ongoing support contract and all other costs such as software licensing, ADA/Spanish speaking services, etc. Sufficient additional detail should be provided for the evaluation committee to clearly identify sources of all costs and expenses. Any costs and expenses not clearly identified as part of the proposal will not be considered at a later date. Prospective vendors should provide complete costing for individual support services.

**Optional costs should be clearly identified as such separately.*

Per Voice Agent Cost for Service Area

ITEM NO.	SERVICE AREA	COST PER AGENT
1.	Staff Services	
1-1	Agents 1 through 25	\$ _____
1-2	Agents 25 through 50	\$ _____
1-3	Agents over 50	\$ _____
	Total	\$ _____
2.	Financial Aid	
2-1	Agents 1 through 25	\$ _____
2-2	Agents 25 through 50	\$ _____

2-3	Agents over 50	\$ _____
	Total	\$ _____
3.	Admissions, Records & Registration	
3-1	Agents 1 through 25	\$ _____
3-2	Agents 25 through 50	\$ _____
3-3	Agents over 50	\$ _____
	Total	\$ _____

COST PER INTEGRATION

ITEM NO.	SERVICE AREA	COST PER CALL
4	Staff Services (ServiceNow)	
4-1	Agents 1 through 25	\$ _____
4-2	Agents 25 through 50	\$ _____
4-3	Agents over 50	\$ _____
	Total	\$ _____
5	Financial Aid (Slate CRM)	

5-1	Agents 1 through 25	\$ _____
5-2	Agents 25 through 50	\$ _____
5-3	Agents over 50	\$ _____
	Total	\$ _____
6	Admissions, Records & Registration (Banner)	
6-1	Agents 1 through 25	\$ _____
6-2	Agents 25 through 50	\$ _____
6-3	Agents over 50	\$ _____
	Total	\$ _____

MISC. ITEMS

ITEM NO.	DESCRIPTION	
7-1	Implementation	\$ _____
7-2	Training	\$ _____
7-3	All Other Charges	\$ _____

TOTAL OF OTHER	\$ _____
-----------------------	----------

Other Call Center Support Provide pricing on any additional services you may provide for the Call Center such as chat bot, text messaging and Rapid Response outbound campaigns and/or robocalls.

ITEM NO.	DESCRIPTION	
8-1	WebChat/Agent	\$ _____
8-2	Social Network/Agent	\$ _____
8-3		\$ _____
8-4		\$ _____

****Additional services, may be requested; on a as needed, as needed basis. Should additional services be needed by the university, additional cost will be negotiated.***

ATTACHMENT B: BONFIRE SUBMISSION INSTRUCTIONS

Online bid portal submission instructions for uploading your proposal begin on the next page.

DESIGNATED CONTACT: The vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to the Contract.

Preston Martin
 (Name, Title)

Preston Martin Channel Manager
 (Printed Name and Title)

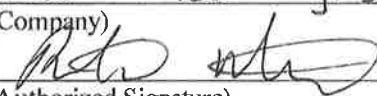
1120 Division Highway, Ephrata PA 17522
 (Address)

717-733-0793 N/A
 (Phone Number) (Fax Number)

Preston@LandisTechnologies.com
 (Email Address)

CERTIFICATION AND SIGNATURE: By signing below, I certify that I have reviewed this Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that the product or service proposed meets the mandatory requirements contained in the Contract for that product or service, unless otherwise stated herein; that the Vendor expressly accepts the terms and conditions contained in the Contract; that Vendor understands and acknowledges that the terms and conditions contained in this contract take precedence over and any terms and conditions that Vendor seeks to be made a part of this contract (regardless of when the terms and conditions become effective) to the extent there is a conflict; that I am authorized by the Vendor to execute and submit this Contract or any documents related thereto on Vendor's behalf; that I am authorized to bind the Vendor in a contractual relationship; and that to the best of my knowledge, the Vendor has/will properly register with the WV Purchasing Division and Marshall University.

Landis Technologies LLC
 (Company)


 (Authorized Signature)

Channel Manager - Preston Martin
 (Printed Name and Title of Authorized Representative)

717-733-0793 N/A
 (Phone Number) (Fax Number)

Revised: 7/15/21

Marshall University General Terms and Conditions



Submission Instructions for Suppliers

Please follow these instructions to submit via our Public Portal.

1. Prepare your submission materials:

Requested Information

Name	Type	# Files	Requirement	Instructions
BID TABLE	File Type: Excel (.xls, .xlsx)	Multiple	Required	
PROPOSAL	File Type: PDF (.pdf)	Multiple	Required	
MU23MSCALLCTR (BT-19EZ)	BidTable: Excel (.xlsx)	1	Required	You will need to fill out the provided Response Template for this BidTable. The Response Template can be downloaded from the project listing on the Bonfire portal.

Requested Documents:

Please note the type and number of files allowed. The maximum upload file size is 1000 MB.

Please do not embed any documents within your uploaded files, as they will not be accessible or evaluated.

Requested BidTables:

The BidTable Response Templates can be obtained at <https://marshall.bonfirehub.com/opportunities/81512>.

Please note that BidTables may take a significant amount of time to prepare.

2. Upload your submission at:

<https://marshall.bonfirehub.com/opportunities/81512>

Your submission must be uploaded, submitted, and finalized prior to the Closing Time of **Jan 10, 2023 2:00 PM EST**. We strongly recommend that you give yourself sufficient time and at



least **ONE (1) day** before Closing Time to begin the uploading process and to finalize your submission.

Important Notes:

Each item of Requested Information will only be visible after the Closing Time.

Uploading large documents may take significant time, depending on the size of the file(s) and your Internet connection speed.

You will receive an email confirmation receipt with a unique confirmation number once you finalize your submission.

Minimum system requirements: Microsoft Edge, Google Chrome, or Mozilla Firefox. Javascript must be enabled. Browser cookies must be enabled.

Need Help?

Marshall University uses a Bonfire portal for accepting and evaluating proposals digitally. Please contact Bonfire at Support@GoBonfire.com for technical questions related to your submission. You can also visit their help forum at <https://vendorsupport.gobonfire.com/hc/en-us>

REQUEST FOR PROPOSAL

Marshall University

MU23MSCALLCTR- Microsoft Teams Contact Center Solution

Proposal 1: Step 1 – \$1,000,000 / \$1,000,000 = Cost Score Percentage of 1 (100%)
Step 2 – 1 X 30 = Total Cost Score of 30

Proposal 2: Step 1 – \$1,000,000 / \$1,100,000 = Cost Score Percentage of 0.909091 (90.9091%)
Step 2 – 0.909091 X 30 = Total Cost Score of 27.27273

6.8. Availability of Information: Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State Department that may require registration.

Landis Technologies
(Company)

Preston Martin Channel Manager
(Representative Name, Title)

717-733-0793
(Contact Phone/Fax Number)

3/7/23
(Date)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.:
MU23MSCALLCTR

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans, and/or specifications, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input checked="" type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input checked="" type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of the addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any University personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Landis Technologies LLC
Company



Authorized Signature

3/7/23
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised: 7/15/21

Marshall University General Terms and Conditions

Request for Proposal		Marshall University Office of Purchasing One John Marshall Drive Huntington, WV 25755-4100 Direct all inquiries regarding this order to: (304) 696-2727	Bid Number MU23MSCALLCTR Addendum No. 01	
Vendor:		For information contact: Michelle Wheeler, Office of Purchasing Phone: (304) 696-2727 Email: michelle.wheeler@marshall.edu & purchasing@marshall.edu		
Sealed requests to bid for furnishing the supplies, equipment or services described below will be received by the Institution. TO RECEIVE CONSIDERATION FOR AWARD, UNLESS OTHERWISE NOTED, THE BID WILL BE SUBMITTED ON THIS FORM AND UPLOADED INTO THE MU BONFIRE PORTAL ON OR BEFORE THE DATE AND TIME SHOWN FOR THE BID OPENING. When applicable, prices will be based on units specified; and Bidders will enter the delivery date or time for items contained herein. The Institution reserves the right to accept or reject bids on each item separately, or as a whole, to reject any or all bids, to waive informalities or irregularities and to contract as the best interests of the Institution may require. BIDS ARE SUBJECT TO THE GENERAL TERMS AND CONDITIONS AS SET FORTH HEREIN.				
DATE	MANDATORY PRE-BID MEETING:	DEPARTMENT REQUISITION NO.	BIDS OPEN:	BIDDER MUST ENTER DELIVERY DATE FOR EACH ITEM BID
01/12/23	No Pre-bid	MU23MSCALLCTR	01/27/23 at 2:00 p.m. EST Broadcast via Teams at https://tinyurl.com/4vwfd5cm	
Item #	Quantity	Description	Unit Price	Extended Price
		ADDENDUM NO. 01 PROJECT NAME: MICROSOFT TEAMS NATIVE CONTACTCENTER SOLUTION To extend the project timeline and move the bid opening date.		
Total				

To the Office of Purchasing,
 In compliance with the above, the undersigned offers and agrees, if this offer is accepted within _____ calendar days (30 calendar days unless different period is inserted by the purchaser) from the bid open date, specified above, to furnish any or all items upon which prices are offered, at the price set opposite each item, delivered at the designated point(s), within the time specified.

Bidder guarantees shipment from _____ within _____ days

FOB _____ After receipt of order at address shown
 Terms _____

BOG 43

Bidder's Name: _____
 Signed By _____
 Typed Name _____
 Title _____
 Email _____
 Street Address _____
 City/State/Zip _____
 Date _____ Phone _____
 Fein _____

SOLICITATION NUMBER: MU23MSCALLCTR
Microsoft Teams Native Contact Center Solution Contract
Addendum Number: No.01

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

Description of Modification to Solicitation:

Addendum issued to modify the dates of this request for proposal bid openings.

1. To extend the technical question deadline to Friday, January 20, 2023.
2. To extend the response to technical question deadline to Tuesday, January 24th, 2023.
3. To extend the technical opening date to Friday, January 27, 2023.
4. To extend the cost opening deadline date to Friday, February 10, 2023.
5. To extend the award date to Friday, February 17, 2023.

NO OTHER CHANGES.

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Attachment A

RFP Revised Schedule of Events:

RFP Schedule of Events:

RFP Released to Public	12/20/2022
Mandatory Pre-bid Conference	N/A
Vendor's Written Questions Submission Deadline	01/20/2023
Addendum Issued.....	1/24/2023
Technical Bid Opening Date	01/27/2023
Technical Evaluation Begins.....	1/27/2023
Oral Presentation	02/01/2023 through 1/27/2023
Cost Bid Opening	2/10/2023
Cost Evaluation Begins	2/10/2023
Contract Award Made	2/17/2023

RFP Revised Schedule of Events:

RFP Schedule of Events:

RFP Released to Public	12/20/2022
Mandatory Pre-bid Conference	N/A
Vendor's Written Questions Submission Deadline	01/20/2023
Addendum Issued.....	1/24/2023
Technical Bid Opening Date	01/27/2023
Technical Evaluation Begins.....	1/27/2023
Oral Presentation	02/01/2023 through 1/27/2023
Cost Bid Opening	2/10/2023
Cost Evaluation Begins	2/10/2023
Contract Award Made	2/17/2023

Request for Proposal		Marshall University Office of Purchasing One John Marshall Drive Huntington, WV 25755-4100 Direct all inquiries regarding this order to: (304) 696-2727	Bid Number MU23MSCALLCTR Addendum No. 02	
Vendor:		For information contact: Michelle Wheeler, Office of Purchasing Phone: (304) 696-2727 Email: michelle.wheeler@marshall.edu & purchasing@marshall.edu		
Sealed requests to bid for furnishing the supplies, equipment or services described below will be received by the Institution. TO RECEIVE CONSIDERATION FOR AWARD, UNLESS OTHERWISE NOTED, THE BID WILL BE SUBMITTED ON THIS FORM AND UPLOADED INTO THE MU BONFIRE PORTAL ON OR BEFORE THE DATE AND TIME SHOWN FOR THE BID OPENING. When applicable, prices will be based on units specified; and Bidders will enter the delivery date or time for Items contained herein. The Institution reserves the right to accept or reject bids on each item separately, or as a whole, to reject any or all bids, to waive informalities or irregularities and to contract as the best interests of the Institution may require. BIDS ARE SUBJECT TO THE GENERAL TERMS AND CONDITIONS AS SET FORTH HEREIN.				
DATE 01/24/23	MANDATORY PRE-BID MEETING: No Pre-bid	DEPARTMENT REQUISITION NO. MU23MSCALLCTR	BIDS OPEN: 02/03/23 at 2:00 p.m. EST Broadcast via Teams at https://tinyurl.com/4vwfd5cm	
		BIDDER MUST ENTER DELIVERY DATE FOR EACH ITEM BID		
Item #	Quantity	Description	Unit Price	Extended Price
		ADDENDUM NO. 02 PROJECT NAME: MICROSOFT TEAMS NATIVE CONTACTCENTER SOLUTION To extend the project timeline and answer vendor technical questions.		
			Total	

To the Office of Purchasing,

In compliance with the above, the undersigned offers and agrees, if this offer is accepted within _____ calendar days (30 calendar days unless a different period is inserted by the purchaser) from the bid open date, specified above, to furnish any or all items upon which prices are offered, at the price set opposite each item, delivered at the designated point(s), within the time specified.

Bidder guarantees shipment from _____ within _____ days

FOB _____ After receipt of order at address shown

Terms _____

BOG 43

Bidder's Name: _____

Signed By _____

Typed Name _____

Title _____

Email _____

Street Address _____

City/State/Zip _____

Date _____ Phone _____

Fein _____

SOLICITATION NUMBER: MU23MSCALLCTR
Microsoft Teams Native Contact Center Solution Contract
Addendum Number: No.02

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

Description of Modification to Solicitation:

Addendum issued to modify the dates of this request for proposal bid openings.

1. To extend the addendum issue date to Thursday, January 26, 2023
2. To extend the technical opening date to Friday, February 03, 2023.
3. To extend the technical evaluation date Friday, February 06, 2023.
4. To extend vendor oral presentation period to Friday, February 10, 2023.
5. To extend the cost opening deadline date to Friday, February 17, 2023.
6. To extend the award date to Friday, February 24, 2023.
7. **NO OTHER CHANGES.**

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Addendum No. 02
MU23MSCALLCTR- Microsoft TEAMS Native
Contact Center Solutions
Marshall University Information Technology
Technical Questions and Answers

Q1. Can you provide the number of agents by business group?

A.1 Please price agents per the price schedule.

Q2. Will there be one Business unit for Marshall?

A2. One business unit.

Q3. The existing contract expires in April, 2023 - Does this apply for all business units?

A3. All units still on the old contact center.

Q4. Who provides inbound voice services today?

A4. We use SIP trunking provided by Lumen. We have 2 on-prem solutions and Microsoft teams in the cloud providing voice services to multiple sites.

Q5. Does Marshall have any Toll-Free numbers in use today? If so, how many toll-free numbers do you have? Can you provide the approximate number of minutes per month of usage?

A5. We do but they have no bearing on the contact center purchase.

Q6. Can Marshall provide a 1-week extension on due date based on answer to questions release date is 1/24 and bid due 3 days later?

A6. Yes, project schedule is extended per this addendum.

Q7. What level of support do you want from the organization you will select? Are you looking for an organization that can provide a strategic partnership to future proof your investment, or are you looking to buy just a software tool?

A7. At this point in time, we are looking for a contact center that will be configurable by MU staff; but are open to viewing options by vendors.

Addendum No. 02
MU23MSCALLCTR- Microsoft TEAMS Native
Contact Center Solutions
Marshall University Information Technology
Technical Questions and Answers

Q8. Are implementation/support services going to be factored into your pricing evaluation?

A8. Yes, contact center should be set up with our Microsoft tenant and handed over to MU staff.

Q9. Should all of the technology for your requirements be under 1 unified platform? Or will you accept solutions pieced together on the backend by multiple technology vendors?

A9. Preferably one platform but open to any solution provided by the vendor.

Q10. How many GBs of calls do you plan on recording per month? How long do you plan on storing those calls for?

A10. At this point we are unsure; please provide storage options in your submittal.

Q11. Do people call into the contact centers using 10 digit DID? If so, approximate number of minutes per month is usage? How many 10-digit DID's connect to the call center do you have?

A11. Yes, we use 10 digits from off campus and 5 digits on campus. It will be 2 DID's in the evaluation.

Q12. Is MU/Medical Center doing any outbound notification (appointment reminders etc.)?

A12. Not at this time, but an interest in phase 2 of our deployment

Q13. Is MU/Medical Center doing any IVR Self Service (payments, records requests, IT Help Desk requests)?

A13. Not at this time, but an interest in phase 2 of our deployment.

Q14. Is Banner integration due on day one of the "go live" date 4/30/23?

A14. Not at this time, but an interest in a later phase of our deployment.

Q15. Is ServiceNow integration due on the day of "go live" date?

Addendum No. 02
MU23MSCALLCTR- Microsoft TEAMS Native
Contact Center Solutions
Marshall University Information Technology
Technical Questions and Answers

A15. Not at this time, but an interest in a later phase of our deployment.

Q16. Are all departments to cutover to new solution on the same date?

A16. No; we will use a targeted timeline to migrate departments.

Q17. Will MU/Medical Center have a dedicated person within each Department to define the specific requirements for that department and also IT Project Manager to oversee the project.

A17. We will have dedicated personnel from each department and a dedicated IT staff member to oversee the implementation.

Q18. Would all existing numbers be able to port over to the new platform? What is the existing carrier for the current numbers?

A18. Yes, numbers will be available to port. Lumen is the current vendor.

Q19. Would the webchat and network agents be dedicated to these channels only? How many agents would need the skill for network agents/social media?

A19. Unsure at this time. We will explore multiple channels with the departments after phase 1 of the implementation.

Q20. Which social media channels would the network agents be using?

A20. Unsure at this time. We will explore multiple channels with the departments after phase 1 of the implementation

Q21. What are the current hours of operations for each area defined in RFP?

A21. Each department will have their own hours of operation but generally between 8:00 am and 5:00 pm.

Q22. Are all agents on premise or off premise or mix of each?

A22. It will be a mix of on and off prem.

Addendum No. 02
MU23MSCALLCTR- Microsoft TEAMS Native
Contact Center Solutions
Marshall University Information Technology
Technical Questions and Answers

Q23. Is the Medical Center appointment scheduling via an IVR being used at this time?

A23. No

Q24. Does IT support contact center changes/call flow or does the Business Unit manage each dept?

A24. IT will change/manage the flows but the BU will update announcements.

Q25. Is the U/Medical Center using any Chatbot/Intelligent AI for Self Service?

A25. Not at this time.

Q26. "4.2.2.8 Call center solution shall utilize integrated data to recognize incoming calls from students and other university stakeholders, as well as provide insights on the number of times that user has called." Will this data come from Banner solution?

A26. When we reach this phase of implementation, multiple sources will be used; including Banner, Cerner, Slate and Service Now.

Q27. On Cost excel spreadsheet can you resend, the cells do not appear to be calculating correctly?

A27. Yes, this can be resent.

Q28. Cost Sheet: How does Marshall want to see the Quantities Required per line?
EX: Agents 1 through 25 will the quantity be 1 or 25?

A28. Quantities from the smallest figure up to the largest figure; i.e., for agents 1 – 25 what would the cost be.

Q29. Section 3: General Terms and Conditions. 13. Pricing/Best Price Guarantee: Notwithstanding the foregoing, the Vendor must extend any publicly advertised sale price to the University and invoice at the lower of the contract price or the publicly advertised sale price. Can Marshall please define "any publicly advertised sales price"?

A29. List price versus discounted price.

Addendum No. 02
MU23MSCALLCTR- Microsoft TEAMS Native
Contact Center Solutions
Marshall University Information Technology
Technical Questions and Answers

Q30. Section 3: General Terms and Conditions, Part 1 Contractual Agreements;
Please confirm that the last two sentences of this section do not apply to any
negotiated terms or documents agreed upon by both parties in writing.

A30. The terms and conditions must be acknowledged and included in
your bid at the time of opening. In the event the vendor has terms and
conditions that conflict with Marshall's terms and conditions, the university
will defer to the WV96 (see attachment C.) If there are still conflicting terms
with the WV96, our legal counsel with attempt to negotiate and signed in
writing by both parties. Any edits made to the WV96 must be approved by
the State of West Virginia Attorney General's Office prior execution.

Q31. Section 3: General Terms and Conditions - Last section above signature in part;
" that Vendor understands and acknowledges that the terms and conditions
contained in this contract take precedence over and any terms and conditions that
Vendor seeks to be made a part of this contract (regardless of when the terms
and conditions become effective) to the extent there is a conflict;"
Please confirm that this section does not apply to any negotiated terms or
documents agreed upon by both parties in writing.

A31. The terms and conditions must be acknowledged and included in
your bid at the time of opening. In the event the vendor has terms and
conditions that conflict with Marshall's terms and conditions, the university
will defer to the WV96 (see attachment C.) If there are still conflicting terms
with the WV96, our legal counsel with attempt to negotiate the form and
have signed in writing by both parties when complete. Any edits made to
the WV96 must be approved by the State of West Virginia Attorney
General's Office prior execution.

Q32. Would the University consider a response deadline extension of 5-7 business days from
the date answers are provided by the University to bidders' questions (Addendum
1/24/23). This will allow sufficient time to evaluate answers and to adjust responses
accordingly.

A32. Yes, extension granted per revised project schedule.

Addendum No. 02
MU23MSCALLCTR- Microsoft TEAMS Native
Contact Center Solutions
Marshall University Information Technology
Technical Questions and Answers

Q33. The Health Clinic Agents/Service Areas are not listed. Please provide an approximate agent/supervisor/administrator total count for the Health Clinic locations.

A33. We have been using 100 total "users" of the system.

Q34. Requests for 'Cost per Agent' provide no estimate of the total number of agents needing to be licensed. Please provide an approximate total count for Agents, Supervisors, and Administrators.

A.34 We would like to have scalability in the contact center. Please use the price schedule and price accordingly.

Q35. Does Marshall use MS Teams as a Private PBX with Phone System to make/receive outside calls? IF not, please specify your telco carrier or indicate if the Contact Center vendor selected is to provide telco service, or just connect to your existing telecom service.

A35. We use Microsoft Direct Routing through Lumen provided SIP trunks.

Q36. How are you currently connecting your MS Teams users to the PSTN? Are you currently using a Direct Routing solution? If not, what solution(s) are you currently using for UCaaS and CCaaS?

A36. We use Microsoft Direct Routing through Lumen provided SIP trunks.

Q37. Will the state consider deleting the requirement (T&C's, requirement 7) as it is inapplicable to a software as a service solution?

A37. Bidders are not required to submit any documents in this section (the are no selected boxes noted.)

Q38. Once in receipt of a proper invoice, will Vendor be paid within 30 days?

A38. Yes, invoice is paid within 30 days.

Q39. Is this clause a statutory prohibition? Will Marshall allow for limiting indirect and consequential damages?

Q39. Yes. Discussion with legal counsel available.

Attachment B

RFP Revised Schedule of Events:

RFP Schedule of Events:

RFP Released to Public	12/20/2022
Mandatory Pre-bid Conference	N/A
Vendor’s Written Questions Submission Deadline	01/20/2023
Addendum Issued.....	1/26/2023
Technical Bid Opening Date	02/03/2023
Technical Evaluation Begins.....	02/06/2023
Oral Presentation	02/01/2023 through 2/10/2023
Cost Bid Opening.....	2/17/2023
Cost Evaluation Begins	2/20/2023
Contract Award Made	2/24/2023

Request for Proposal		Marshall University Office of Purchasing One John Marshall Drive Huntington, WV 25755-4100 Direct all inquiries regarding this order to: (304) 696-2727	Bid Number MU23MSCALLCTR Addendum No. 03	
Vendor:		For information contact: Michelle Wheeler, Office of Purchasing Phone: (304) 696-2727 Email: michelle.wheeler@marshall.edu & purchasing@marshall.edu		
Sealed requests to bid for furnishing the supplies, equipment or services described below will be received by the Institution. TO RECEIVE CONSIDERATION FOR AWARD, UNLESS OTHERWISE NOTED, THE BID WILL BE SUBMITTED ON THIS FORM AND UPLOADED INTO THE MU BONFIRE PORTAL ON OR BEFORE THE DATE AND TIME SHOWN FOR THE BID OPENING. When applicable, prices will be based on units specified; and Bidders will enter the delivery date or time for items contained herein. The Institution reserves the right to accept or reject bids on each item separately, or as a whole, to reject any or all bids, to waive informalities or irregularities and to contract as the best interests of the Institution may require. BIDS ARE SUBJECT TO THE GENERAL TERMS AND CONDITIONS AS SET FORTH HEREIN.				
DATE 01/30/23	MANDATORY PRE-BID MEETING: No Pre-bid	DEPARTMENT REQUISITION NO. MU23MSCALLCTR	BIDS OPEN: 02/10/23 at 2:00 p.m. EST Broadcast via Teams at https://tinyurl.com/4vwfd5cm	BIDDER MUST ENTER DELIVERY DATE FOR EACH ITEM BID
Item #	Quantity	Description	Unit Price	Extended Price
		ADDENDUM NO. 03 PROJECT NAME: MICROSOFT TEAMS NATIVE CONTACT CENTER SOLUTION To extend the project timeline and answer vendor technical questions from Addendum 2.		
Total				

To the Office of Purchasing,
 In compliance with the above, the undersigned offers and agrees, if this offer is accepted within _____ calendar days (30 calendar days unless a different period is inserted by the purchaser) from the bid open date, specified above, to furnish any or all items upon which prices are offered, at the price set opposite each item, delivered at the designated point(s), within the time specified.

Bidder guarantees shipment from _____ within _____ days

FOB _____ After receipt of order at address shown
 Terms _____

BOG 43

Bidder's Name: _____
 Signed By _____
 Typed Name _____
 Title _____
 Email _____
 Street Address _____
 City/State/Zip _____
 Date _____ Phone _____
 Fein _____

SOLICITATION NUMBER: MU23MSCALLCTR
Microsoft Teams Native Contact Center Solution Contract
Addendum Number: No.03

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

Description of Modification to Solicitation:

Addendum issued to modify the dates of this request for proposal bid openings.

1. Addendum 3 issue date to Monday, January 30, 2023
2. To extend the technical opening date to Friday, February 10, 2023.
3. To extend the technical evaluation date Monday, February 13, 2023.
4. To extend vendor oral presentation period to Thursday, February 16, 2023.
5. To extend the cost opening deadline date to Friday, February 17, 2023.
6. To extend the award date to Friday, February 24, 2023.
7. Vendor question responses.

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Attachment A

RFP Revised Schedule of Events:

RFP Schedule of Events:

RFP Released to Public	12/20/2022
Mandatory Pre-bid Conference	N/A
Vendor’s Written Questions Submission Deadline	01/20/2023
Addendum Issued.....	1/30/2023
Technical Bid Opening Date	02/10/2023
Technical Evaluation Begins.....	02/13/2023
Oral Presentation	02/10/2023 through 2/16/2023
Cost Bid Opening.....	2/17/2023
Cost Evaluation Begins	2/20/2023
Contract Award Made	2/24/2023

Request for Proposal		Marshall University Office of Purchasing One John Marshall Drive Huntington, WV 25755-4100 Direct all inquiries regarding this order to: (304) 696-2727	Bid Number MU23MSCALLCTR Addendum No. 04	
Vendor:		For information contact: Michelle Wheeler, Office of Purchasing Phone: (304) 696-2727 Email: michelle.wheeler@marshall.edu & purchasing@marshall.edu		
Sealed requests to bid for furnishing the supplies, equipment or services described below will be received by the Institution. TO RECEIVE CONSIDERATION FOR AWARD, UNLESS OTHERWISE NOTED, THE BID WILL BE SUBMITTED ON THIS FORM AND UPLOADED INTO THE MU BONFIRE PORTAL ON OR BEFORE THE DATE AND TIME SHOWN FOR THE BID OPENING. When applicable, prices will be based on units specified; and Bidders will enter the delivery date or time for items contained herein. The Institution reserves the right to accept or reject bids on each item separately, or as a whole, to reject any or all bids, to waive informalities or irregularities and to contract as the best interests of the Institution may require. BIDS ARE SUBJECT TO THE GENERAL TERMS AND CONDITIONS AS SET FORTH HEREIN.				
DATE 02/24/23	MANDATORY PRE-BID MEETING: No Pre-bid	DEPARTMENT REQUISITION NO. MU23MSCALLCTR	BIDS OPEN: 03/10/23 at 2:00 p.m. EST Broadcast via Teams at https://tinyurl.com/4vwfd5cm	BIDDER MUST ENTER DELIVERY DATE FOR EACH ITEM BID
Item #	Quantity	Description	Unit Price	Extended Price
		ADDENDUM NO. 04 PROJECT NAME: MICROSOFT TEAMS NATIVE CONTACT CENTER SOLUTION To extend the project timeline and cost opening to March 10, 2023.		
Total				

To the Office of Purchasing,
 In compliance with the above, the undersigned offers and agrees, if this offer is accepted within _____ calendar days (30 calendar days unless a different period is inserted by the purchaser) from the bid open date, specified above, to furnish any or all items upon which prices are offered, at the price set opposite each item, delivered at the designated point(s), within the time specified.

Bidder guarantees shipment from _____ within _____ days

Bidder's Name: _____

Signed By _____

FOB _____ After receipt of order at address shown

Typed Name _____

Terms _____

Title _____

Email _____

Street Address _____

City/State/Zip _____

Date _____ Phone _____

Fein _____

BOG 43

SOLICITATION NUMBER: MU23MSCALLCTR
Microsoft Teams Native Contact Center Solution Contract
Addendum Number: No.04

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- [X] Modify bid opening date and time
- [] Modify specifications of product or service being sought
- [] Attachment of vendor questions and responses
- [] Attachment of pre-bid sign-in sheet
- [] Correction of error
- [] Other

Description of Modification to Solicitation:

Addendum issued to modify the dates of this request for proposal bid openings.

1. To extend vendor oral presentation period to Friday, March 03, 2023.
2. To extend the cost opening deadline date to Thursday, March 10, 2023.
3. To extend the award date to Friday, March 17, 2023.

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Attachment A

RFP Revised Schedule of Events:

RFP Schedule of Events:

RFP Released to Public	12/20/2022
Mandatory Pre-bid Conference	N/A
Vendor’s Written Questions Submission Deadline	01/20/2023
Addendum Issued.....	01/30/2023
Technical Bid Opening Date	02/10/2023
Technical Evaluation Begins.....	02/13/2023
Oral Presentation	03/03/2023 through 03/09/2023
Cost Bid Opening.....	3/10/2023
Cost Evaluation Begins	3/10/2023
Contract Award Made	3/17/2023

1 of 1 | [View All](#) Some of the values entered as Search Criteria for UI secured field ...

Vendor/Customer

[Menu](#)

Vendor/Customer	Legal Name	Alias/DBA	Vendor Active Status	Customer Active Status	Previous Name
✓ VC0000127508	LANDIS TECHNOLOGIES LLC	MATTHEW LANDIS	Active	Inactive	

From 1 to 1 of 1 First Prev Next Last [Attachments](#)

Save [Undo](#) Delete Insert [Copy](#) Paste [Search](#)

▼ **General Info**

Vendor/Customer : VC0000127508	Restrict Use by Department :
Legal Name : LANDIS TECHNOLOGIE	Miscellaneous Account :
Alias/DBA : MATTHEW LANDIS	Internal Account :
Vendor Active Status : (Active)	Third Party Only :
Vendor Approval Status : Complete	Third Party Vendor :
Customer Active Status : (Inactive)	Third Party Customer :
Customer Approval Status : Incomplete	Inventory Customer :
Location Name :	Healthcare Provider :
First Name :	Never Archive :
Middle Name :	Restrict VSS Access : (No)
Last Name :	Discontinue - No New Business :
Company Name : LANDIS TECHNOLOGIE	Prevent MA Reference :
Previous Name :	PunchOut Enabled :
Previous Street :	Re-PunchOut Enabled :
Previous City :	Electronic Order Enabled :
Previous State/Province :	W-9 Received :
Previous Country :	W-9 Received Date : 04/07/2023
	W-8 Received :
	W-8 Received Date :
	Accepts Credit Cards :
	Active From : 04/11/2023
	Active To :
	Last Usage Date : 04/12/2023
	Department :
	Unit :

▶ **Headquarters**

▶ **Organization**

▶ **Disbursement Options**

▶ **Prenote/EFT**

▶ **Remittance Advice**

▶ **Vendor Terms**

▼ **ACCOUNTS RECEIVABLE**

▶ **Accounts Receivable**

▶ **eMALL**

▶ **Location Information**

▶ **Fee and Vendor Compliance Holds**

Fee Exempt :	<input type="checkbox"/>	Tax Clearance :
Registration Application Date :		Unemployment Insurance :
Registration Effective Date :		Worker's Compensation :
Registration Expiration Date :		Secretary of State Registration :
Pre-Registration Code :		Federal Debarred :

▶ **Executive Compensation**

▶ **Additional Information**

▶ **Travel**

▶ **Change Management**

[Top](#)

CREATE DOCUMENT> [Create New Record](#) [Modify Existing Record](#)

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