REQUEST FOR BIDS/PROPOSALS COVERSHEET
THE UNIVERSITY OF SOUTHERN MISSISSIPPI
Procurement and Contract Services
118 College Drive #5003, Hattiesburg, Mississippi 39406-0001
Date: October 6, 2016

Bid No. 17-11

THE UNIVERSITY OF SOUTHERN MISSISSIPPI is considering the purchase of the following item(s). We ask that you submit your bid and retain one copy for your files. Right is reserved to accept or reject any part of your bid. Your quotation will be given consideration if received in Bond Hall, Room 214 on or before:

2:00 p.m. CST

November 1, 2016

AWARDING CONTRACT - Cash terms will not be used as a basis for awarding contracts; however, the University will accept cash discounts when earned.

NOTE: If you cannot quote on the exact material shown, please indicate any exception giving brand name and complete specifications of any alternate. If additional space is required, use a separate sheet or letter of transmittal.

ITEM DESCRIPTION
RFP for Telecom Management & Billing Software

NAME: ____________________________
COMPANY: ____________________________
ADDRESS: ____________________________
CITY/STATE/ZIP: ____________________________

TERMS - Bidder should state terms of sale. Our terms are 2% ten days, net 45 days. These terms will apply unless otherwise specified.

AWARDING CONTRACT - Cash terms will not be used as a basis for awarding contracts; however, the University will accept cash discounts when earned.

PROPOSAL MUST BE RETURNED TO THE UNIVERSITY IN A SEALED ENVELOPE. RFP NUMBER AND DATE OF BID OPENING MUST BE SHOWN ON THE OUTSIDE OF THE ENVELOPE.

We quote you as above-F.O.B. The University of Southern Mississippi. Shipment can be made in N/A days from receipt of order. DATE ______________  TERMS _____________________________________________

Return quotation to Procurement Services at above address.

Signature Required

AA/EOE/ADA
GENERAL TERMS, CONDITIONS, AND INSTRUCTIONS TO BIDDERS

1.) Failure to examine any drawings, specifications, and instructions will be at bidder’s risk.

2.) Samples of items when called for must be furnished free of expense and if not destroyed in testing, will, upon request, be returned at the bidder’s expense. Request for the return of samples must be made within ten (10) days following opening bids. Each individual sample must be labeled with bidder’s name and manufacturer’s brand name and number.

3.) Bids must be signed and sealed with bidder’s name and address on outside of the envelope, and the time and date of the bid opening and the bid file number shown in the lower-left corner of the envelope.

4.) In order for your bid to be considered, it must be received in our office by 2:00 p.m. of the bid opening date. It is the responsibility of the vendor to ensure their bid is received within the appointed time. If your bid package is not received in Bond Hall, Room 214, by 2:00 p.m. on the bid opening date, it will not be considered.

If you are delivering your bid, hand-carry the bid package to:

The University of Southern Mississippi
Procurement Services
Bond Hall, Room 214
Hattiesburg, Mississippi

If you are mailing your bid package via U.S. Postal Service, mail to:

The University of Southern Mississippi
Procurement Services
118 College Drive #5003
Hattiesburg, MS 39406-0001

If you are express mailing your bid package via Federal Express or UPS, or any other delivery service which requires the use of a physical address, deliver to:

The University of Southern Mississippi
Receiving Department
2609 West 4th Street
Hattiesburg, MS 39401
5.) The bid file number and the date & time of bid opening is to be shown in the lower-left corner of all bid packages; envelopes, express mailing labels, boxes, etc.

6.) Bids and modifications or corrections thereof received after the closing time specified will not be considered. No bid shall be altered or amended after the specified time for opening bids.

7.) The University of Southern Mississippi reserves the right to reject any and all bids, to waive any informality in bids, and unless otherwise specified by the bidders, to accept any items on the bid. If the bidder fails to state the time within which bids must be accepted, it is understood and agreed that The University of Southern Mississippi shall have 60 days to accept.

8.) Contracts and purchases will be made or entered into with the lowest, responsible bidder meeting specifications.

9.) A written purchase order or contract award mailed or otherwise furnished to the successful bidder within the time of acceptance specified in the Invitation for Bid results in a binding contract without further action by either party. The contract shall not be assignable by the vendor in whole or in part without the written consent of The University of Southern Mississippi.

10.) Bid files may be examined during normal working hours by bid participants. Non-participants will be prohibited from obtaining any information relative to the bid until the official award has been made.

11.) If purchase orders or contracts are canceled because of the awarded vendor’s failure to perform or request for price increase, that vendor shall be removed from our bidders’ list for a period of 24 months.

12.) No addendum will be issued within a period of two (2) working days prior to the time and date set for the bid opening. Should it become necessary to issue an addendum within the two-day period prior to the bid opening, the bid date will be re-scheduled to give bidders ample time to answer the addendum.

13.) Alternate bids unless specifically requested will not be considered.

14.) Bid openings will be conducted open to the public; however, they are held only to open the bids. No discussion will be entered into with any vendor as to the quality or provisions of the specifications, and no award will be made either stated or implied at the bid opening. After the close of the bid opening meeting, the bids will be considered to be in the evaluation process and will not be available for review by bidders.
15.) Prices quoted shall be firm for the term of the contract or for the stated time of acceptance.

16.) The bidder understands that The University of Southern Mississippi is an equal opportunity employer and, therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, or any other such discrimination; and the bidder, by signing this bid, agrees during the term of agreement that the bidder will strictly adhere to this policy in its employment practices and provision of products or services.

17.) Bidders must upon request of The University of Southern Mississippi furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these specifications. The University of Southern Mississippi reserves the right to make the final determination as to the bidder’s ability.

18.) Questions or problems arising from bid procedures or subsequent order and delivery procedures should be directed to:

Buyer
The University of Southern Mississippi
118 College Drive #5003
Hattiesburg, MS 39406-0001
Phone: (601) 266-4131
bids@usm.edu

19.) All items must equal or exceed the specifications listed. The absence of detail specifications or the omission of detail description shall be recognized as meaning that only the best commercial practices are to prevail and that only first quality materials and workmanship are to be used.

20.) It is the intent of the specifications to obtain a product that will adequately meet the needs of the user while promoting the greatest extent of competition that is practicable. It is the responsibility of the prospective bidder to review the entire Invitation to Bid or Proposal packet and to notify The University of Southern Mississippi if the Specifications, Instructions, General or Special Conditions are formulated in a manner which would unnecessarily restrict competition. Any protest or question concerning the specifications or bidding procedures must be received in the Purchasing office not less than 72 hours prior to the time and date set for bid opening.

21.) It shall be incumbent upon the bidders to understand the specifications. Any requests for clarifications shall be in writing and shall be submitted to our Procurement Services office at least five (5) days prior to the time and date set for the bid opening.

22.) The minimum specifications are used to set a standard and in no case are used with the
intention to discriminate against any manufacturer. Bidders should note the name and the manufacturer and model number of the product they propose to furnish and submit descriptive literature.

23.) Trade names, brand names, and/or manufacturer’s information used in these specifications are for the purpose of establishing quality. Unless specifically stated otherwise, bids on products of other qualified manufacturers are acceptable, provided they are demonstrated as equal to those specified in construction, design, and suitability. Each bidder shall submit with his bid a complete brochure with pictures on each item and shall point out specifically any deviations from the specified items. Failure to do so may disqualify any bid. Please bid as specified or an approved equal.

24.) A copy of the manufacturer’s standard guarantee shall accompany and become a part of this bid.

25.) There are no federal or state laws that prohibit bidders from submitting a bid lower than a price or bid given to the U.S. Government. Bidders may bid lower than U.S. Government contract price without any liability as The University of Southern Mississippi is exempt from the provisions of the Robinson-Patman Act and other related laws. In addition, the U.S. Government has no provisions in any of its purchasing arrangements with bidders whereby a lower price to The University of Southern Mississippi must automatically be given to the U.S. Government.

26.) Unless otherwise specified in the specifications, all invoices are to be billed to:

The University of Southern Mississippi
Accounts Payable
118 College Drive #5104
Hattiesburg, MS 39406-0001

27.) Unless otherwise specified, all equipment bids shall be of current production and of the latest design and construction.

28.) Where all, or part(s), of the bid is requested on a unit price basis, both the unit prices and the extensions of the unit prices constitute a basis of determining the lowest responsible and responsive bidder. In cases of error in the extension of price, the unit price will govern.

AA/EOE/ADA1
Telecom Management & Billing Software

REQUEST FOR PROPOSAL (RFP)

10/06/16
Table of Contents

1. INFORMATION TO VENDORS .................................................................................................................. 3
   1.1. ISSUING INSTITUTION / DEPARTMENT / UNIT ............................................................................... 3
   1.2. CONTACT INFORMATION ................................................................................................................. 3
   1.3. IMPORTANT DATES ............................................................................................................................ 3
   1.4. TERMINOLOGY ................................................................................................................................. 3
   1.5. INSTRUCTIONS TO VENDORS ........................................................................................................ 3

2. VENDOR INFORMATION AND QUALIFICATIONS .................................................................................... 4
   2.1. CONTACT INFORMATION .................................................................................................................. 4
       2.1.1. Required Information .................................................................................................................. 4
       2.1.2. Principals ................................................................................................................................... 5
       2.1.3. Contract Executives ................................................................................................................. 5
       2.1.4. Account Executives .................................................................................................................. 5
   2.2. RIGHT TO REQUEST INFORMATION .................................................................................................. 5
   2.3. PROFESSIONAL STANDING ............................................................................................................ 5
   2.4. REFERENCES ..................................................................................................................................... 5
   2.5. FOREIGN CORPORATIONS (OUTSIDE MISSISSIPPI) ................................................................. 5
   2.6. INSURANCE FOR CONTRACTORS ON CAMPUS ........................................................................... 6

3. FORM AND CONTENT OF PROPOSALS ................................................................................................... 6
   3.1. LEGIBILITY AND ORGANIZATION .................................................................................................... 6
   3.2. COMPLETENESS OF RESPONSE ..................................................................................................... 6
   3.3. ABBREVIATED RESPONSES ............................................................................................................. 6
   3.4. VENDOR RESPONSIBLE FOR COMPLETENESS OF COSTS ......................................................... 6
   3.5. SOLE POINT OF CONTACT ............................................................................................................... 7
   3.6. COPIES ............................................................................................................................................. 7
   3.7. SIGNATURES ...................................................................................................................................... 7

4. RFP AND PROPOSAL TERMS AND CONDITIONS ...................................................................................... 7
   4.1. RIGHT TO WITHDRAW PROPOSALS ............................................................................................... 7
   4.2. RIGHT TO REJECT PROPOSALS ...................................................................................................... 8
   4.3. QUESTIONS AND ANSWERS ......................................................................................................... 8
   4.4. UNIVERSITY NOT RESPONSIBLE FOR PROPOSAL EXPENSES .............................................. 8
   4.5. UNIVERSITY RIGHT TO MODIFY SPECIFICATIONS .................................................................... 8
   4.6. ALTERNATIVES AND EQUIVALENTS TO REQUIREMENTS ....................................................... 8
   4.7. NON-PERFORMANCE ...................................................................................................................... 8
   4.8. REJECTED MATERIAL .................................................................................................................... 8
   4.9. RESTRICTED COMMUNICATIONS ................................................................................................... 8
   4.10. CONFIDENTIALITY ......................................................................................................................... 9
   4.11. REQUEST FOR PROPOSALS DO NOT OBLIGATE ...................................................................... 9
   4.12. USE OF INFORMATION .................................................................................................................. 9
   4.13. PUBLICITY ................................................................................................................................... 9

5. PURCHASE CONTRACT TERMS AND CONDITIONS .................................................................................. 9
   5.1. ACKNOWLEDGMENT PRECLUDES LATER EXCEPTION ................................................................. 9
   5.2. MANDATORY LEGAL PROVISIONS .............................................................................................. 9
   5.3. DRAFT CONTRACTS ....................................................................................................................... 10
   5.4. DRAFT PURCHASE AGREEMENT .................................................................................................. 10
   5.5. PAYMENT ..................................................................................................................................... 10
   5.6. PURCHASE CONTRACT COMPONENTS .......................................................................................... 11
   5.7. CHANGES TO PURCHASE CONTRACT ........................................................................................... 11
   5.8. USM TERMS AND CONDITIONS ..................................................................................................... 11
   5.9. MATERIALS AND WARRANTIES .................................................................................................... 11
5.10. FINAL ACCEPTANCE ................................................................................................................................. 11
5.11. LEGAL AND REGULATORY COMPLIANCE .............................................................................................. 11
5.12. PATENT INFRINGEMENTS .......................................................................................................................... 12
5.13. VALID PURCHASE CONTRACT REQUIRED TO BEGIN WORK ............................................................... 12
5.14. SEGMENTATION OF AWARD .................................................................................................................... 12
5.15. PROPOSAL EXCEPTION ............................................................................................................................ 12

6. SCOPE OF WORK ........................................................................................................................................... 13

6.1. INTRODUCTION ............................................................................................................................................. 13
6.2. OBJECTIVES .................................................................................................................................................. 14
6.3. CRITERIA FOR AWARD OF PURCHASE CONTRACT: .................................................................................. 15
6.4. MANDATORY AND OPTIONAL PROVISIONS IN DETAILED SPECIFICATIONS AND REQUIREMENTS OF THIS RFP 16
6.5. DETAILED SPECIFICATIONS AND REQUIREMENTS ................................................................................... 16
6.6. ADDITIONAL REQUIREMENTS .................................................................................................................... 17
6.7. DELIVERY ..................................................................................................................................................... 17

7. COSTS ................................................................................................................................................................ 17

7.1. COST INFORMATION SUBMISSION ........................................................................................................... 17
7.2. NO UNSPECIFIED COSTS .......................................................................................................................... 18
7.3. PRICE CHANGES DURING AWARD OR RENEWAL PERIOD ................................................................... 18
7.4. EXPIRATION OF COSTS PROPOSED .......................................................................................................... 18
7.5. BEST AND FINAL OFFER ........................................................................................................................... 19

APPENDIX A- STANDARD CONTRACT (EITHER SERVICES CONTRACT OR PURCHASE AGREEMENT TEMPLATE) ........................................................................................................................ 20

APPENDIX B - PROFESSIONAL AND PERSONAL SERVICES AGREEMENT AND INDEPENDENT CONTRACTOR STATUS DETERMINATION AND DOCUMENTATION FORM AND CONFIDENTIALITY STATEMENT ........................................................................................................................... 21

APPENDIX C – DETAILED SPECIFICATIONS AND REQUIREMENTS .................................................................. 22
1. Information to Vendors

1.1. Issuing Institution / Department / Unit
The University of Southern Mississippi
iTech / Information Technology Services

1.2. Contact Information
Proposal Information:
Buyer
The University of Southern Mississippi
118 College Drive #5003
Hattiesburg, MS 39406
bids@usm.edu

Technical Information:
Financial Specialist
The University of Southern Mississippi
118 College Drive #5181
Hattiesburg, MS 39406
computer.orders@usm.edu

1.3. Important Dates
See Cover Sheet or contact the Proposal Information Contact(s) listed in Section 1.2.

1.4. Terminology
The term “RFP” refers to this Request for Proposals document.
For purposes of this RFP, the terms “Contractor”, “Vendor” and “Respondent” are used interchangeably.
For purposes of this RFP, the terms “The University of Southern Mississippi”, “Southern Miss”, “USM”, and “the University” are used interchangeably.
Any statement in this document that contains the word “must” or the word “shall” requires mandatory response and is so noted with “VENDOR RESPONSE REQUIRED”.
“Will comply” or “agreed” are used interchangeably to indicate that the Vendor will adhere to the requirement. These terms are used to respond to statements that specify that a Vendor or Vendor’s proposed solution must comply with a specific item or must perform a certain task.

“Acknowledged” should be used in each section when no Vendor response or Vendor compliance is required. “Acknowledged” simply means the Vendor is confirming to the University that the statement has been read and understood.

Technical terms used in this RFP are intended to follow industry conventions. Respondents should request clarification of terms wherever there is uncertainty as to the exact meaning.

1.5. Instructions to Vendors
Sealed proposals for this RFP will be received in the Department of Procurement & Contract Services Office, Bond Hall, Second Floor, Box 5003, Hattiesburg, Mississippi 39406-5003 until 2:00 p.m. of the specified date on the cover sheet.
Each proposal must be submitted in a sealed envelope bearing on the outside the name “Telecom Management & Billing Software,” the name of the Vendor, the Vendor address, and the notification of opening at 2:00 p.m. on the specified date on the cover sheet.
Any proposal may be withdrawn prior to scheduled time for the opening of proposals or authorized postponement thereof. Any proposal received after the time and date specified will not be considered.

The University of Southern Mississippi reserves the right to accept or reject any or all proposals and to waive any formalities.

Vendors are responsible for examining all specifications, terms, conditions, and instructions of this request. Failure to do so will be at Vendor’s risk.

Vendors need to use the same outline numbering, and respond to each one, even if the response is “No response required.” The Vendor needs to respond in writing with “acknowledged,” “will comply,” or “agreed” to any section that contains “must” or “shall” to confirm agreement. Failure of the Vendor to meet this requirement may cause a Vendor’s response to be thrown out and considered non-responsive at the sole discretion of the University.

If the Vendor cannot respond with “acknowledged,” “will comply,” or “agreed,” then the Vendor MUST respond with “exception.” (See Section 5.15, for additional instructions regarding Vendor exceptions.)

Where an outline point asks a question or requests information, the Vendor MUST respond with the specific answer or information requested. In addition, Vendor should provide explicit details as to the manner and degree to which the proposal meets or exceeds each specification.

Many items in this RFP require detailed and specific responses to provide the requested information. Failure to provide the information requested will result in the Vendor receiving a lower score for that item, or, at the University’s sole discretion, being subject to disqualification.

Vendors must ensure, through reasonable and sufficient follow-up, proper compliance with, and fulfillment of all schedules and deliverables specified within the body of this RFP. The University will not be responsible for the failure of any delivery medium for submission of information to or from the Vendor, including but not limited to, public and private carriers, U.S. mail, Internet Service Providers, facsimile, or e-mail.

Vendors must submit all questions in regards to this proposal no later than 5:00pm on Tuesday, October 25 to the contacts listed in Section 1.3. The University will respond by an addendum no later than the following Thursday, October 27. Extensions to the proposal due date will only occur if deemed necessary by the University to allow Vendors sufficient time to review the responses.

2. Vendor Information and Qualifications

2.1. Contact Information

2.1.1. REQUIRED INFORMATION

VENDOR RESPONSE REQUIRED:

The respondent must provide the following information for each of the parties below:

- Responding Company
- Contact Name
- Address
- Country
• Phone Number
• Email Address

2.1.2. PRINCIPALS
Company principals or corporate officers

2.1.3. CONTRACT EXECUTIVES
Executive that will be the purchase contract authority for the transaction described in this RFP.

2.1.4. ACCOUNT EXECUTIVES
Executive(s) that will be responsible for managing the business relationship between the respondent and Southern Miss described in this RFP.

2.2. Right to Request Information
The University reserves the right to request information relative to a Vendor’s references and financial status and to visit a Vendor’s facilities during normal working hours. The University also reserves the right to request a current financial statement, prepared and certified by an independent auditing firm, and reserves the right to require that Vendors document their financial ability to provide the products and services proposed up to the total dollar amount of the Vendor’s cost proposal. The University reserves the right to request information about the Vendor from any previous customer of the Vendor of whom the University is aware, even if that customer is not included in the Vendor’s list of references.

2.3. Professional Standing
Respondents to this RFP MUST be in relevant professional practice and MUST provide a W-9 for verifiable documentation in the RFP response. If applicable, vendor should also provide Business License jurisdiction and numbers, and Contractor License numbers for both the primary and subcontractors.

VENDOR RESPONSE REQUIRED: Vendor W9 provided in RFP response on page_____. Additional information (please use N/A if not applicable):

<table>
<thead>
<tr>
<th>Business License Jurisdiction:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Business License Number:</td>
<td></td>
</tr>
<tr>
<td>Contractor License Number (Primary):</td>
<td></td>
</tr>
<tr>
<td>Contractor License Number (Subcontractor):</td>
<td></td>
</tr>
</tbody>
</table>

2.4. References
Respondents SHOULD provide a minimum of three (3) customer references, including contact information, that have implemented the proposed solution and/or services in the last 12 months; preferably from higher education institutions.

VENDOR RESPONSE REQUIRED: References provided in RFP response on page_____.

2.5. Foreign Corporations (outside Mississippi)
If applicable under Mississippi law, Vendors should be registered with the Mississippi Secretary of State’s office in order to transact business in the State of Mississippi. Respondents to this RFP MUST provide appropriate proof that this registration has been completed before a bid can be awarded. Additional information regarding this Certificate of Authority can be found on the Mississippi Secretary of State’s website.
VENDOR RESPONSE REQUIRED: Proof of registration provided in RFP response on page_____. OR Vendor will comply if selected.

2.6. **Insurance for Contractors on Campus**

If this RFP is for services/contractual labor, the Contractor, as an independent contractor, **shall** provide proof of Comprehensive General Liability insurance, Workers’ Compensation insurance and Commercial Auto Liability insurance. The Contractor shall provide a Certificate of Coverage e-mailed prior to start of services. The Certificate of Coverage should, at a minimum, contain the name of the carrier, effective and expiration dates of coverage, a description of the covered perils and amount of coverage by peril, the name and mailing address of the insurance company, and the name and mailing address of the insurance agent. The Certificate of Coverage must name the Board of Trustees of State Institutions of Higher Learning and The University of Southern Mississippi as an additional insured and be endorsed accordingly. The Comprehensive General Liability coverage shall be a minimum amount of One Million Dollars ($1,000,000) per occurrence and the Commercial Auto Liability coverage shall be a minimum amount of Three Hundred Thousand ($300,000) through an insurance company with a Best rating of A- or higher and a financial size Class X or higher approved by the Mississippi Department of Insurance.

VENDOR RESPONSE REQUIRED: Certificate of Insurance provided in RFP response on page_____. OR Vendor will comply if selected.

3. **Form and Content of Proposals**

3.1. **Legibility and Organization**

Proposals **MUST** be printed, written in English, legible, and appropriately structured as stated in Section 1.5 Instructions to Vendors. Each page needs be numbered sequentially. Proposals **MUST** be bound.

The completeness, clarity, and organization of the proposal will be one of the evaluation criteria in Vendor selection.

VENDOR RESPONSE REQUIRED: Vendor acknowledges OR Vendor Exception.

3.2. **Completeness of Response**

Vendors **MUST** include responses to all of the provisions and items of this RFP. Failure to comply may cause the response to be considered incomplete.

VENDOR RESPONSE REQUIRED: Vendor acknowledges OR Vendor Exception.

3.3. **Abbreviated Responses**

Simple concurrence or acknowledgement to items not needing a specific Contractor statement may be used. However, simple concurrence or acknowledgement of items that do require a specific Contractor statement, explanation or supporting materials will be considered non-responsive.

3.4. **Vendor Responsible for Completeness of Costs**

It is the responsibility of the Vendor to clearly identify all costs associated with any item or series of items in this RFP. The Vendor **must** include and complete all parts of the cost proposal in a clear and accurate manner. Omissions, errors, misrepresentations, or inadequate details in the Vendor’s cost proposal may be grounds for rejection of the Vendor’s proposal. Costs that are not clearly identified will be borne by the Vendor. The Vendor **must** complete the Cost Information Submission in this RFP, which outlines the minimum requirements for providing cost information. The Vendor should supply supporting details as described in the Cost Information Submission.
3.5. Sole Point of Contact

USM will consider the selected Vendor to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

1. The Vendor must acknowledge and agree that in matters of proposals, clarifications, negotiations, contracts and resolution of issues and/or disputes, the Vendor represents all contractors, third parties and/or subcontractors the Vendor has assembled for this project. The Vendor’s commitments are binding on all such parties and consequently USM is only required to negotiate with the Vendor.

2. Furthermore, the Vendor acknowledges and agrees to pass all rights and/or services related to all general consulting, services leasing, software licensing, warranties, hardware maintenance and/or software support to USM from any contractor, third party or subcontractor without USM having to negotiate separately or individually with any such parties for these terms or conditions.

3. Should a proposing Vendor wish to assign payment of any or all charges resulting from this contract to a third party, Vendor must disclose that fact in his/her proposal, along with the third party’s name, address, nature of business, and relationship to the proposing Vendor, the reason for and purpose of the assignment, and all conditions of the assignment, including but not limited to a copy of an assignment document to be executed by USM, the Vendor, and the third party. Such assignments will be accepted or rejected at the sole discretion of USM. Vendor must clearly and definitively state in his/her proposal whether the proposal is contingent upon the requested assignment of payments. Whenever any assignment of payment is requested, the proposal, contract, and assignment document must include language specifically guaranteeing that the proposing Vendor is solely and fully liable and responsible for the performance of its obligations under the subject contract. No assignment of payment will be considered at the time of purchase unless such assignment was fully disclosed in the Vendor’s proposal and subsequently accepted by USM.

3.6. Copies

At least one (1) signed original and two (2) signed copies of the proposal MUST be provided. The University requires a portable electronic virus/malware free copy (CD, thumb drive) of the RFP response from the responding Vendor to be included in the bid response package. If an electronic copy is not included, the University reserves the right to request an electronic copy of the exact bid response prior to review of the bid.

3.7. Signatures

A duly authorized and legally binding original signature must be present on each submitted copy of the proposal.

4. RFP and Proposal Terms and Conditions

4.1. Right to Withdraw Proposals

Vendors may withdraw proposals at any time prior to signature of purchase contract for any reason they deem appropriate.
4.2. **Right to Reject Proposals**

The University reserves the right to accept any proposal or, at its discretion, reject any or all proposals for any reason it deems appropriate.

4.3. **Questions and Answers**

All Vendors will receive copies of questions and responses, which are deemed pertinent by the University. To ensure equal treatment for each responding Vendor, all questions regarding this RFP must be submitted in writing to this RFP’s contact person for more information, and no later than the last date for accepting questions provided in this RFP. All such questions will be answered officially by the University in writing. Pertinent questions and answers will become addenda to this RFP. Questions submitted after the deadline are subject to be discarded.

4.4. **University Not Responsible for Proposal Expenses**

Receipt of a proposal does not obligate the University to pay any expenses incurred by the Contractor in preparation of the proposal or obligate the University in any other respect.

4.5. **University Right to Modify Specifications**

The University reserves the right to modify the specifications contained herein at any time during the proposal period. No modification or interpretation of the specifications other than through the issuance of addenda will be binding upon the University. Contractors must notify the University as soon as possible of any omissions or errors in the specifications so that corrective addenda may be issued.

4.6. **Alternatives and Equivalents to Requirements**

Alternatives and equivalents to the University stated requirements will be reviewed and evaluated. The Vendor must submit an explanation of how/why the substituted product is an alternative or an equivalent. The University reserves the right to reject any proposals that do not comply with this instruction. Glossy ads, such as published materials used for advertisements, may be included, but are not acceptable as substitute for the Vendor explanation as to how/why the described product is an alternative or an equivalent.

4.7. **Non-Performance**

In the event of non-performance on the part of the Vendor (i.e., failure and/or inability to meet agreed upon deadlines or specifications as outlined herein), consequential damages or breach of contract may be claimed by the University.

4.8. **Rejected Material**

If material is rejected during normal inspections or at the final acceptance inspection, it will be reported to the Vendor in writing.

If the Vendor does not take action to repair, remove, or replace the rejected material within ten (10) days after receipt of written notice, the University reserves the right to remove and replace the material. The Vendor shall be responsible for any and all expenses associated with the remediation of the material.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception.

4.9. **Restricted Communications**

From the issue date of this RFP until a Vendor is selected and announced, all responding Vendors or their representatives may not communicate, either orally or in writing, regarding this RFP with any University employee except as noted herein. Vendor may consult with the University’s specified points of contact listed above in Section 1.2. Conversations with persons...
other than designated contacts about any aspect of this RFP, proposal, contract, or purchase may subject a Vendor’s response to be rejected.

4.10. Confidentiality
All information in this RFP is considered confidential and should not be disclosed to third parties.

All proposals become the property of The University of Southern Mississippi upon receipt. The proposals will not be released in part or in total for third party evaluation, unless other arrangements are requested at the time of proposal submission.

4.11. Request for Proposals Do Not Obligate
Neither the publication nor distribution of this RFP nor the receipt of proposals constitutes any obligation or commitment on the part of the University. This RFP does not commit the University to contract for any requirements detailed in this document. The University reserves the right to reject any or all offers and to waive formalities and minor irregularities in the proposal received.

4.12. Use of Information
The University reserves the right to use any or all design ideas or concepts presented in any proposal submitted in response to this RFP. This right will exist even if proposal states otherwise.

4.13. Publicity
No public mention of this RFP, contract, or purchase may be used for publicity, marketing, sales or promotional purposes without prior written approval from the University.

5. Purchase contract Terms and Conditions

5.1. Acknowledgment Precludes Later Exception
By responding to this RFP, the Vendor is contractually obligated to comply with all items in this RFP, including the Standard Contract in Exhibit A if included herein, except those specifically listed as exceptions on the Proposal Exception Summary Form. If no Proposal Exception Summary Form is included, the Vendor is indicating that he takes no exceptions. Vendors who respond to this RFP may not later take exception to any item in this RFP during purchase contract negotiations. The University, at its sole discretion, may require that all or part of this RFP document as well as the vendor’s RFP response be included as an attachment to the executed contract. This acknowledgement also contractually obligates any and all subcontractors that may be proposed. No exceptions for subcontractors or separate terms and conditions will be entertained after the fact.

5.2. Mandatory Legal Provisions
- Any provisions disclaiming implied warranties shall be null and void. See Mississippi Code Annotated Sections 11-7-18 and 75-2-719(4). The Vendor shall not disclaim the implied warranties of merchantability and fitness for a particular purpose.
- The Vendor shall have no limitation on liability for claims related to the following items:
  - Infringement issues;
  - Bodily injury;
  - Death;
  - Physical damage to tangible personal and/or real property; and/or
  - The intentional and willful misconduct or negligent acts of the Vendor and/or Vendor’s employees or subcontractors.
- All requirements that the University pay interest (other than in connection with lease purchase contracts not exceeding five years) are deleted.
- Should any of the terms and conditions in the purchase contract be in conflict with the laws of the State of Mississippi, the laws of the State of Mississippi shall supersede and govern. A revision of the terms and conditions will be required to ensure compliance with Mississippi state law.
- The University shall not pay any attorney’s fees, prejudgment interest or the cost of legal action to or for the Vendor.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception.

5.3. Draft Contracts

A properly executed contract (included in Appendix A) is a requirement of this RFP. After an award has been made, it will be necessary for the winning Vendor to execute a contract with the University. The inclusion of this contract does not preclude the University from, at its sole discretion, negotiating additional terms and conditions with the selected Vendor(s) specific to the projects covered by this RFP. If Vendor cannot comply with any term or condition of this Standard Contract, Vendor must list and explain each specific exception on the Proposal Exception Summary Form included in this RFP. The Proposal Exception Summary Form must be submitted to the University with the signed Bid response.

The bid response SHOULD include guaranteed pricing for an option to renew the contract annually for up to four (4) additional years. Renewal for up to four (4) additional years is not guaranteed and at the discretion of the University; whatever is deemed to be in the best interest of the University.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception. Notice of guaranteed pricing included in bid response on page _____.

The University requires one point of contact for management of the implementation and services of this purchase contract.

A draft Service Level Agreement (SLA) SHOULD be submitted with the response.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception. Service Level Agreement included in bid response on page _____.

The winning Vendor is required to complete a Professional and Personal Services Agreement and Independent Contractor Status Determination and Documentation Form for the services included in this RFP prior to a Purchase Order being issued. See Appendix B for draft documents.

**VENDOR RESPONSE REQUIRED:** Vendor will comply if selected OR Vendor exception.

5.4. Draft Purchase Agreement

Intentionally left blank.

5.5. Payment

The currency used for payment of costs will be in United States dollars.

During implementation the University is to be billed in installments based upon mutually agreed upon project implementation milestones completed. The final installment will be paid within 45 days of completion of the implementation.

If the University chooses to renew the contract for the optional additional years, the University requests to be billed annually.

State law requires that the University receive an original invoice from the Vendor and that payment of the invoice is processed within 45 days of receipt (Miss Code 31-7-305). The
invoice should be on the Vendor’s letterhead and/or include an original Vendor representative signature.

USM may choose to use a VISA® Purchasing Card and E-Payables PAVA process for invoice payments in place of a check to pay for purchases from this solicitation. Unless exception is noted in the bid response, the bidder, by submitting a response agrees, to accept the VISA® Purchasing Card and E-Payables PAVA process as an acceptable form of payment and may not add additional service fees/handling charges to purchases made with the VISA® Purchasing Card.

5.6. Purchase contract Components
This RFP, written questions, answers to questions, Vendor’s proposal, and other documents associated with this RFP may become part of the resultant purchase contract.

5.7. Changes to Purchase contract
During the course of the delivery and ordering process, either party may issue requests for changes in the purchase contract. This *shall* take the form of either a modification to the original purchase contract or a written Addendum which, if accepted by both parties, *shall* be executed as a change to the purchase contract, which will thereby be amended to the extent of the change. In no event *shall* changes involving extra costs to The University of Southern Mississippi be allowed to proceed without prior written approval.

5.8. USM Terms and Conditions
Unless written exception is provided in the RFP response, the winning Vendor agrees to be bound by the USM Terms and Conditions, which are incorporated herein, and may be found at http://www.usm.edu/procurement-contract-services/usm-terms-and-conditions.pdf.

**VENDOR RESPONSE REQUIRED:** Vendor will comply OR Vendor Exception.

5.9. Materials and Warranties
Intentionally left blank.

5.10. Final Acceptance
The following requirements *must* be met before the purchase will be considered complete and final payments made. A minimum of fifteen (15%) percent of the purchase contract price may be held until final acceptance.

- An inspection by University personnel will have been completed and all issues and/or defects will have been resolved and brought into conformance with the letter and spirit of the specifications, terms, and conditions of the purchase contract.
- Acceptance of the licenses, software and/or equipment (if required) and the release of final payment will be dependent on the items meeting specifications set forth in this RFP without defect for a period of 45 days.

The University of Southern Mississippi reserves the right to itself or its designated representatives to inspect and approve all items included in this purchase.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception.

5.11. Legal and Regulatory Compliance
Respondents are required to comply with all applicable local, State and Federal laws, codes, ordinances, and regulations in the provision of the materials required.

Respondents *must* comply with Personally Identifiable Information (PII) data protection with regard to State, Federal, and University regulations and policies.
The winning Vendor’s candidate(s) are each required to sign a “Confidentiality Statement” prior to gaining access to University systems. See Appendix B for draft documents.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception.

### 5.12. Patent Infringements

The Vendor **shall** agree to indemnify The University of Southern Mississippi with respect to any legal suit, claim, or proceeding, which may be brought against it claiming the use of the proposed material constitutes an infringement of any patent or trade secret. The Vendor will further agree to defend the University against any such claims and to pay all litigation costs, attorneys’ fees, settlement payments, and any damages awarded or resulting from any such claims.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception.

### 5.13. Valid Purchase Contract Required to Begin Work

The winning Vendor should not commence any billable work until a valid purchase order and applicable contract have been executed. Any work done by the winning Vendor prior to the execution of the purchase order and applicable contract is complete will be at the Vendor’s sole risk. The University is under no obligation to pay for work done prior to the execution of a purchase order and applicable contract.

### 5.14. Segmentation of Award

The University will award the contract to a single vendor, but reserves the right to make to select features, functions and/or hardware on an all, none or line by line basis, whichever is deemed to be in the best interest of the University. The itemization of costs **must** be detailed enough to allow for such changes and to make appropriate and fair cost adjustment calculations resulting from such changes reasonable and manageable.

### 5.15. Proposal Exception

Please return the Proposal Exception Summary Form at the end of this section with all exceptions to items in any Section of this RFP listed and clearly explained or state “No Exceptions Taken.” If no Proposal Exception Summary Form is included, the Vendor is indicating that the Vendor takes no exceptions to any item in this RFP document.

**5.15.1.** Unless specifically disallowed on any specification herein, the Vendor may take exception to any point within this RFP, including a specification denoted with “**shall**” or “**must**,” as long as the following are true:

- The specification is not a matter of State law;
- The proposal still meets the intent of this RFP;
- A Proposal Exception Summary Form is included with Vendor’s proposal; and
- The exception is clearly explained, along with any alternative or substitution the Vendor proposes to address the intent of the specification, on the Proposal Exception Summary Form.

**5.15.2.** The Vendor has no liability to provide items to which an exception has been taken. The University has no obligation to accept any exception. During the proposal evaluation and/or purchase contract negotiation process, the Vendor and the University will discuss each exception and take one of the following actions:

- The Vendor will withdraw the exception and meet the specification in the manner prescribed;
- The University will determine that the exception neither poses significant risk to the project nor undermines the intent of this RFP and will accept the exception;
• The University and the Vendor will agree on compromise language dealing with the exception and will insert same into the purchase contract; or
• None of the above actions are possible, and the University either disqualifies the Vendor’s proposal or withdraws the award and proceeds to the next ranked Vendor.

5.15.3. Should the University and the Vendor reach a successful agreement, the University will sign adjacent to each exception which is being accepted or submit a formal written response to the Proposal Exception Summary responding to each of the Vendor’s exceptions. The Proposal Exception Summary, with those exceptions approved by the University, will become a part of any purchase contract on acquisitions made under this RFP.

5.15.4. An exception will be accepted or rejected at the sole discretion of the University.

5.15.5. The University desires to award this RFP to a Vendor or Vendors with whom there is a high probability of establishing a mutually agreeable purchase contract, substantially within the standard terms and conditions of the University’s RFP, including the Standard Contract in Exhibit A, if included herein. As such, Vendors whose proposals, in the sole opinion of the University, reflect a substantial number of material exceptions to this RFP, may place themselves at a comparative disadvantage in the evaluation process or risk disqualification of their proposals.

PROPOSAL EXCEPTION SUMMARY FORM

VENDOR RESPONSE REQUIRED: List and clearly explain any exceptions, for all RFP Sections and Exhibits, in the table below. If no exceptions are taken, please note “No Exceptions” in item 1 in the table below.

<table>
<thead>
<tr>
<th>RFP Reference (Reference specific outline point to which exception is taken)</th>
<th>Vendor Proposal Reference (Page, section, items in Vendor’s proposal where exception is explained)</th>
<th>Brief Explanation of Exception (Short description of exception)</th>
<th>University Acceptance (sign here only if accepted)</th>
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<tbody>
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6. Scope of Work

6.1. Introduction

The University desires to procure a new Telecommunications Management System (TMS) to support the operational divisions within the agency. The goal is to automate as much of the
ordering, billing, and inventory processes as possible and to provide the customer with information needed to better manage telecommunications resources.

The University provides centralized services in the areas of telecommunications (voice, data, and video), centralized computing (UNIX, Windows, storage management, etc.), as well as other basic IT related applications (DNS, e-mail, Internet, etc.) to internal university departments as well as some external customers. The IT department (iTech) recovers costs through various fees and rates using an internal billing process. Although the major focus of this procurement is to address the telecommunications portion of iTech services and the associated billing, the University desires to use the proposed systems to include other services such as centralized computing, basic IT related applications, consulting, and other fee-based services sometime in the future.

Requests for telecommunications-related work are received through service requests (scheduled work) from the customer via Cherwell work order system or email. For service requests, a customer service representative in iTech compiles the customer information including billing codes, work description, customer contacts, etc. The information is recorded in the current telecomm management & billing request system. The service request system journals the work request and implementation process, and provides the actual work order, inventory information, and charge-back information. Once compiled, the service request is reviewed by a customer service representative or technician for the creation of an appropriate solution to the customer request. This stage normally includes how the request will be implemented, what type of equipment will be needed, what type of circuit will be needed, and the technologies to be employed, as well as assigning the necessary information to enable the equipment and services to be ordered or pulled from inventory.

This group also schedules vendors, contractors and internal technicians for any necessary work such as cabling, equipment installation, cross-connects, etc. Once completed, resource usage information is compiled including billable and non-billable equipment and/or labor. The completed order is routed to the billing group who makes sure all the billing information is correct, confirms completion of the request with the customer, closes the order, and generates the appropriate bill to the customer. Customer bills are generated on a monthly basis.

Trouble tickets for voice and data are normally generated through a trouble call or through the network operations center. This may involve opening tickets with circuit suppliers or passing the ticket to an internal service technician where some of the processes used for scheduled service requests are invoked (although typically a much shorter form) resulting in the resolution of the problem and possible billing activity depending on the nature of the work performed.

The current telecommunications environment consists of approximately:

- 500 External Users accessing the system simultaneously;
- 10 iTech Staff accessing the software simultaneously;
- 10,000+ phone lines with approximately 6,000 provisioned;
- 12 months of historical information on-line;
- 500+ node Cisco route/switch based TCP/IP network utilizing LAN / WAN circuits.

The current system interfaces with Cisco Call Manager version 10.5 pending upgrade to version 11.5.

The current system processes long distance charges via CDR records through an automated import.

6.2. Objectives

iTech’s vision is to replace the existing system and processes with a turnkey, feature rich, fully integrated modular system that will support on-line service order request, inventory information, and billing. The proposed system will fully manage the order process from the
initial request through billing the customer. The proposed system should include, but not be limited to, software and its licensing, installation, implementation assistance, data conversion, customization, project management, and training. Some of the required features include: browser-based service order request; browser-based trouble reporting; service catalog resources; electronic billing; browser-based inventory records; customer and vendor bill reconciliation; relational database with enhanced reporting and auditing capabilities; enhanced call collector capabilities; cable path documentation; cost allocation management; and, hooks into our Cherwell centralized help desk solution. The proposed system will establish a single-point-of-entry operations environment that eliminates redundant data entry and eliminates fragmented systems. Staff will be able to quickly access customer information to reduce processing time, increase accuracy, lessen rework, streamline work processes and improve intra and inter departmental communication. The proposed system will be highly modifiable by iTech using built-in capabilities of the system, as much as possible, rather than through custom vendor code.

The University is seeking to identify the software that is awarded this bid as the standard Telecom Management and Billing software for the University.

6.3. Criteria for Award of Purchase contract:

The Vendor selected for an award will be the Vendor whose proposal, as presented in the response to this RFP, is the most advantageous. The university is not bound to accept the lowest priced proposal if that proposal is not in the best interest of the university as determined by the Evaluation Committee.

Consideration may also be given to any additional information and comments if they should increase the benefits to the university. Upon completion of the initial review and evaluation of the proposals submitted, selected Vendors may be invited to participate in oral presentations.

All proposals will be evaluated by appointed representatives of the university in accordance with the following procedures:

1. The Appointed Representatives of the Evaluation Committee will evaluate the vendor written responses on the criteria set forth under Instructions to Vendors in Section 1.5.
2. The written responses will be evaluated by the Evaluation Committee on the Criteria listed under Detailed Specifications and Requirements (Section 6.5). Point values assigned are listed below.
3. The initial evaluations will take place separately and without discussion among Evaluation Committee members. The Evaluation Committee members will then meet to identify the top proposals for further consideration.
4. If Oral Presentations are required, a series of questions will be prepared by the Evaluation Committee and presented to each Short Listed vendor by purchasing representative. Additionally, a set schedule will be made available from which a Presentation date will be chosen by vendor.
5. If the Evaluation Committee determines that Oral Presentations are not required the determination of the preferred vendor will be communicated to the USM Department of Procurement and Contract Services.
6. After a preferred vendor is identified, a purchasing representative will send notification letters (via e-mail) to all vendors regarding Evaluation Committee's decision to award.
7. Vendors are strongly encouraged to deliver their responses identifying the criteria listed below and explaining how the product meets or exceeds the criteria (e.g. “Criteria 1 – Our product meets the criteria by providing…I”). THIS IS CRITICAL TO THE EVALUATION PROCESS. Responses must be in the same order as the criteria.

The criteria in the following table will be used to evaluate and score each part based on the allotted points.
<table>
<thead>
<tr>
<th>Description</th>
<th>Possible Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td>535 (29%)</td>
</tr>
<tr>
<td>Requirements</td>
<td>965 (54%)</td>
</tr>
<tr>
<td>Delivery Schedule/Project Plan</td>
<td>200 (11%)</td>
</tr>
<tr>
<td>Proposal Clarity and Organization</td>
<td>100 (6%)</td>
</tr>
<tr>
<td><strong>Total Points</strong></td>
<td><strong>1800</strong></td>
</tr>
</tbody>
</table>

A point value assigned to each criteria by the Evaluator to each Criteria:

- 0 – Vendor did not respond to this Criteria
- 1 – The Response to this Criteria was Poor
- 2 – The Response to this Criteria was Fair
- 3 – The Response to this Criteria was Average
- 4 – The Response to this Criteria was Good
- 5 – The Response to this Criteria was Excellent

Proposal Evaluation: Five (5) points will be awarded for each proposal's completeness, clarity, and organization of the proposal. Full points will be awarded if content of Vendor's response is structured properly and complete.

- 1 – The completeness, clarity and organization in the response was Poor
- 2 – The completeness, clarity and organization in the response was Fair
- 3 – The completeness, clarity and organization in the response was Average
- 4 – The completeness, clarity and organization in the response was Good
- 5 – The completeness, clarity and organization in the response was Excellent
- Maximum possible points per candidate = 5

Cost Evaluation - Points will be assigned using the following formula: \((1 - ((B - A) / A)) \times n\)

Where:
- \(A\) = Total lifecycle cost of lowest valid proposal
- \(B\) = Total lifecycle cost of proposal being scored
- \(n\) = Maximum number of points allocated to cost for acquisition

Delivery Schedule and Project Plan:

Ten (10) points will be awarded to the Vendor with the shortest time of implementation.

The University will also consider and evaluate alternate licensing, volume pricing, or enterprise agreements that meet all the requirements of Appendix C, and offer related value-added services.

6.4. Mandatory and Optional Provisions in Detailed Specifications and Requirements of this RFP

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6.5. Detailed Specifications and Requirements

The Vendor response **must** meet the following specifications and requirements. The Vendor **must** include a response to each of the items in Appendix C. In most cases, a simple yes or no **WILL NOT** be accepted. For all applicable items, a detailed explanation should be included.
6.6. **Additional Requirements**

The University acknowledges that the specifications within this RFP are not exhaustive. Rather, they reflect the known requirements that must be met by the proposed system. Vendors **must** specify, here, what additional components may be needed and are proposed in order to complete each configuration.

6.7. **Delivery**

Anticipated implementation is anticipated to begin December 1, 2016. If Vendor is unable to meet this timeframe, the Vendor **SHOULD** describe the best possible delivery schedule. The delivery schedule will be scored based on the Vendor’s ability to meet the anticipated implementation as closely as possible.

On-site training and support will need to be scheduled no later than six (6) weeks from the bid award date. Travel expenses must not be billed separately. Proposal must take into account the cost of any travel expenses.

Remote or video conference training will need to be scheduled no later than six (6) weeks from the bid award date. A toll-free number must be provided by the vendor or any long distance costs associated with training must be the responsibility of the Vendor.

Custom development will begin six (6) to eight (8) weeks from the bid award date.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges delivery timeframe can be met OR Vendor Exception.

7. **Costs**

7.1. **Cost Information Submission**

**VENDOR RESPONSE REQUIRED:** Vendors **must** propose a summary of all applicable project costs in the matrix that follows. The matrix **must** be supplemented by a cost itemization fully detailing the basis of each cost category. The level of detail **must** address the following elements as applicable: item, description, quantity, retail, discount, extension, and deliverable. Any cost not listed in this section may result in the Vendor providing those products or services at no charge to the University or face rejection of proposal. If your response to this RFP does not include an item listed below in the far left column, "Not Included" may be used.

The Vendor may choose to provide a fixed annual cost for ongoing maintenance and support, or elect to provide a Maximum Annual Increase percentage in the last column provided. **NOTE:** If you choose to only provide a maximum annual increase, we will score the cost of your proposal at the maximum rate.

<table>
<thead>
<tr>
<th>Description</th>
<th>One-Time Cost</th>
<th>Annual Cost (Years 1-5)</th>
<th>Maximum Annual Increase (%)</th>
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<tbody>
<tr>
<td>Recommended application software, including all core modules</td>
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<tr>
<td>Additional application software modules, please specify</td>
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<tr>
<td>Other required software (please itemize)</td>
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</table>
The proposal costs **must** be annualized to include a detailed itemization for all implementation / consulting services / personnel fees by resource type and number of hours, software by license, maintenance by item and term, content by source and any other items necessary for the service.

Travel expenses must not be billed separately. Proposal must take into account the cost of any travel expenses.

### 7.2. No Unspecified Costs

Only items included in the Cost Information Submission list will be considered part of the proposal and only those items will be included in any payments to the Contractor.

If any component(s) necessary for operation of the requested system is omitted from Vendor’s proposal, the Vendor **must** be willing to provide the component(s) at no additional cost and included at the price in this RFP response. This includes any software modules, licensing or interface tools necessary to render the system fully operational.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception.

### 7.3. Price Changes during Award or Renewal Period

A price increase will not be accepted during the award period or the renewal period, unless stipulated in the **purchase contract**. However, the University will always take advantage of price decreases.

### 7.4. Expiration of Costs Proposed

The proposal response price will be guaranteed for a minimum of ninety days from bid opening date.
The University reserves the right to renew this contract with the winning Vendor on an annual basis. The proposal response **SHOULD** include guaranteed prices for annual renewals up to four (4) additional years.

**VENDOR RESPONSE REQUIRED:** Vendor acknowledges OR Vendor Exception.

**7.5. Best and Final Offer**

The University reserves the right to solicit Best and Final Offers (BAFOs) from Vendors, principally in situations in which proposal costs eclipse available funding, or the University believes none of the competing proposals presents a Best Value (lowest and best proposal) opportunity. Because of the time and expense incurred by both the Vendor community and the University, BAFOs are not routinely conducted. Vendors should offer their best pricing with the initial solicitation. Situations warranting solicitation of a BAFO will be considered an exceptional practice for any procurement. Vendors that remain in a competitive range within an evaluation may be requested to tender Best and Final Offers, at the sole discretion of the University. All such Vendors will be provided an equal opportunity to respond with a Best and Final Offer under a procedure to be defined by the University that encompasses the specific, refined needs of a project, as part of the BAFO solicitation. The University may re-evaluate and amend the original project specifications should it be deemed necessary in order to improve the opportunity for attaining Best Value scenarios from among the remaining competing Vendors. All BAFO proceedings will be uniformly conducted, in writing, and be subject to solicitation by the University and receipt from the Vendors under a precise schedule.
APPENDIX A- Standard Contract (Either Services Contract or Purchase Agreement template)

A properly executed contract is a requirement of this RFP. After an award has been made, it will be necessary for the winning Vendor to execute a contract with the University. The inclusion of this contract does not preclude the University from, at its sole discretion, negotiating additional terms and conditions with the selected Vendor(s) specific to the projects covered by this RFP. If Vendor cannot comply with any term or condition of this Standard Contract, Vendor must list and explain each specific exception on the Proposal Exception Summary Form included in this RFP.
APPENDIX B - Professional and Personal Services Agreement and Independent Contractor Status Determination and Documentation Form and Confidentiality Statement