


<b>Request for Proposal</b>	 <b>Marshall University</b> <b>Office of Purchasing</b> <b>One John Marshall Drive</b> <b>Huntington, WV 25755-4100</b> Direct all inquiries regarding this order to: (304) 696-2727	<b>Bid Number</b> MU23MSCALLCTR <b>Addendum No. 02</b>
<b>Vendor:</b>		
<b>For information contact:</b> Michelle Wheeler, Office of Purchasing <b>Phone:</b> (304) 696-2727 <b>Email:</b> <a href="mailto:michelle.wheeler@marshall.edu">michelle.wheeler@marshall.edu</a> & <a href="mailto:purchasing@marshall.edu">purchasing@marshall.edu</a>		
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.		
<b>DATE</b>  01/25/23	<b>MANDATORY PRE-BID MEETING:</b>  No Pre-bid	<b>DEPARTMENT REQUISITION NO.</b>  MU23MSCALLCTR
		<b>BIDS OPEN:</b> 02/03/23 at 2:00 p.m. EST Broadcast via Teams at <a href="https://tinyurl.com/4vwfd5cm">https://tinyurl.com/4vwfd5cm</a>
		<b>BIDDER MUST ENTER DELIVERY DATE FOR EACH ITEM BID</b>
Item #	Quantity	Description
		<b>ADDENDUM NO. 02</b>  <b>PROJECT NAME: MICROSOFT TEAMS NATIVE CONTACT CENTER SOLUTION</b>  To extend the project timeline and answer vendor technical questions.
		Unit Price
		Extended Price
		<b>Total</b>

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 \_\_\_\_\_

Bidder's Name: \_\_\_\_\_

Signed By \_\_\_\_\_

Typed Name \_\_\_\_\_

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.02

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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
- ☒ [ X ] 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 Wednesday, January 25, 2023
2. To extend the technical opening date to Friday, February 03, 2023.
3. To extend the technical evaluation date Monday, February 06, 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.....	1/25/2023
Technical Bid Opening Date .....	02/03/2023
Technical Evaluation Begins.....	02/06/2023
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

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**MU23MSCALLCTR- Microsoft TEAMS Native**  
**Contact Center Solutions**  
**Marshall University Information Technology**  
**Technical Questions and Answers**

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- Q1.** Can you provide the number of agents by business group?
- A1.** Please price agents per the price
- Q2.** schedule. Will there be one Business unit for
- 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.
- Q8.** Are implementation/support services going to be factored into your pricing evaluation?

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- 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 piece mailed 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 digits 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?
- 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.

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**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.

**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.

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**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.

**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 will supersede any terms that conflict. Negotiated terms should be placed into the contract so that they do not conflict with the Terms and Conditions. Usually this is accomplished by modifying the Terms and Conditions.



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**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 will supersede any terms that conflict. Negotiated terms should be placed into the contract so that they do not conflict with the terms and Usually this is accomplished by modifying the Terms and Conditions.

**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.

**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.

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**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. The University can limit damaged for indirect and consequential damages.

**Q40.** Please clarify when these fees (Marshall University's Information Technology Services and Support Department (IT) Fees) would be applicable.

**A40.** If for any reason you would require services from IT for the following services:

- Desktop Services
- Email & Cloud
- Data Center and Services
- Website & Enterprise Applications
- Identity & Account Management
- Communications

**ADDENDUM ACKNOWLEDGEMENT  
FORM SOLICITATION NO.:**

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 type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6  |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7  |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8  |
| <input 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 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.

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Company

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Authorized Signature

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Date

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