

RFP # 683381 – SPECIFICATIONS

1. Description of Cooperative

Educational & Institutional Cooperative Services, Inc. (E&I) is a member owned New York non-profit corporation established in 1934 and is governed by a Board of Directors. The Board of Directors is a group of professionals who are elected by the E&I Membership. The Board provides oversight to ensure the Members’ needs are addressed and met. Our Membership is comprised of public and private universities and colleges, community colleges, other affiliated members, K-12, and teaching healthcare facilities throughout the United States.

Our mission is to assist our members in creating supply-chain efficiencies, lowering costs and reducing risks by collaborating with our members, suppliers and strategic partners. We deliver exceptional value to higher education, K-12 and related communities by making it easy for them to access high-quality contracts, strategic sourcing expertise, insights and unrivaled customer service.

2. Purpose and Intent of the Request for Proposal (RFP)

The purpose of this RFP is to establish a cost-effective Master Agreement (“Agreement”) for **Hosted Cloud Telecom & Web Conferencing Services** which complies with our Member procurement requirements and will provide E&I Members a procurement vehicle to acquire the products and/or services outlined within this RFP. All E&I Members will be eligible to participate in the resulting agreement.

Products and/or services considered for award shall equal or exceed the quality level of industry standards as defined within this RFP and shall comply with all applicable federal, state, and local technical, environmental, and performance standards and specifications.

The awarded Respondent(s) is/are expected to be the manufacturer or a fully authorized dealer/distributor for any of the manufacturers it proposes. The Respondent and its distributors must be able to provide service and timely deliveries to all Members and campuses. Direct involvement by the awarded Respondent may be necessary to assist Members in understanding the different types of products/services available and in selecting the best solution to fit their needs.

E&I is committed to utilizing purchasing and business practices in accordance with the National Association of Educational Procurement Code of Ethics. The primary goals and objectives of E&I are to: (1) assist our Members to obtain the absolute lowest cost and best value that exceeds other public sector consortia agreements, (2) establish a strategic sourcing partnership with any selected manufacturer(s) and authorized dealers, and (3) enhance our position as the premier Procurement Cooperative for Education.

3. E&I and Internet2 Collaboration

E&I is collaborating with Internet2 on this RFP and will work to drive the process on behalf of the E&I Membership. Representatives of Internet2 have worked with E&I to develop the scope of services in this RFP. The resulting agreement(s) will be drawn between E&I and awarded Respondent(s) and made available to E&I Members. Internet2 Members will require membership with E&I to be eligible to participate in the Agreement.

About Internet2

Internet2 is a non-profit, member-driven advanced technology community founded by the nation’s leading higher education institutions in 1996. Internet2 serves 319 U.S. universities, 60 government agencies, 43 regional and state education networks and through them supports more than 100,000 community anchor institutions, over 1,000 InCommon participants, and 59 leading corporations working with our community, and 70 national research and education network partners that represent more than 100 countries.

4. Market Opportunity

By satisfying the above Member needs, the Cooperative anticipates significant Member purchases to be recorded against the resulting Agreement(s). The Cooperative currently has more than 5,000 Members, comprised of roughly 50% public and 50% private. K-12 school districts, academic healthcare and research institutions have become eligible for membership in E&I. The Cooperative’s expectations are a substantial opportunity for growth (in terms of Member purchases) with

RFP # 683381 – SPECIFICATIONS

competitively awarded Agreement(s) in these markets. There is also interest in utilizing the potential contract by the Participating Oregon Community Colleges (POCC).

5. Member Participation

Once the awarded Respondent has been established and the Agreement finalized, individual E&I Members (in some situations Member departments) will review the awarded Respondent’s program and determine their individual participation. See Section B43 of Attachment B of E&I’s *Master Agreement Template (Prerequisite #5)* for specific details on how members participate in awarded Respondent’s program. The awarded Respondent’s program includes the Agreement along with additional supporting materials (if any) developed by the awarded Respondent.

Upon award of a Master Agreement from this RFP, the Respondent shall be provided an electronic file listing of E&I Members. Updated versions will be sent as needed. E&I will post the awarded Respondent’s program on the E&I internal web site. The E&I web site is password protected and only available to the Members.

6. Term

The Agreement term will be for five (5) years with the option of one five (5)-year renewal. Exercise of any renewal will require formal written notification and mutual agreement between E&I and Respondent at least one (1) year prior to Agreement expiration.

If this RFP results in an Agreement, a hold-over clause may be invoked by the E&I member on a month by month or year by year basis as per the agreement between the member and Respondent utilizing the same terms and conditions as listed in Agreement between the awarded Respondent and E&I.

7. Sole Point of Contact

Catherine Goglia
Contract Manager, Information Technology
Educational and Institutional Cooperative Services, Inc.
2 Jericho Plaza, Suite 309
Jericho, New York, 11753-1671
Voice: 631-630-8318
E-Mail: cgoglia@eandi.org

Please use the Question & Answer (Q&A) Board within the RFP event of E&I’s Electronic Sourcing Solution to ask any questions. See the Tentative Schedule of Events for the last day to submit questions. At all times it shall remain the responsibility of the Respondent participating in the RFP to check the RFP event for any addenda, notices or award decisions and the Question and Answer Board for updates. No further notice will be given.

- Respondents are expected to raise any questions or concerns they have regarding the RFP. If Respondent discovers any significant ambiguity, error, conflict, discrepancy, omission or other deficiency in this RFP, Respondent should immediately notify the Sole Point of Contact of the deficiency and request modification or clarification of the RFP document using the Q&A Board.
- Any questions and responses specific to the terms and conditions, process, procedures, language, specifications and other parts of the RFP may be made public and may be shared with other Respondents. Questions and responses that contain proprietary information will be answered confidentially.

Only those communications that are in writing from E&I shall be considered as a duly authorized expression on behalf of E&I. Respondents may not consider any verbal instructions as an official expression on E&I’s behalf. **QUESTIONS DIRECTED TO, OR ANY PROPOSALS RECEIVED FROM ANY OTHER PERSON, AGENT, OR REPRESENTATIVE OF E&I WILL NOT BE CONSIDERED VALID OR BINDING.** Also, E&I will recognize only communications from Respondents that are either signed and in writing or submitted directly within E&I’s Electronic Sourcing System as duly authorized expressions on behalf of the Respondent.

RFP # 683381 – SPECIFICATIONS

Respondents to this RFP or persons acting on their behalf shall not contact any E&I employee, officer, or agent; any E&I Board of Directors; or any E&I Member concerning any aspect of this RFP, except in writing to the Sole Point of Contact or the Vice President, Strategic Sourcing & Contract Management, from the date of release of this RFP through the official award date. Violation of this provision may be grounds for rejecting a proposal response.

8. Tentative Schedule of Events

This is the tentative schedule of events Respondents must follow in submitting their proposals.

| Activity | Due Date |
|--|----------------------------------|
| Request for Proposal issued | December 20, 2019 |
| Pre-Proposal Conference to be held via WebEx Registration Required https://eandi.webex.com/eandi/j.php?MTID=m86e412ca6443197142e645e01c3aedf3 | December 27, 2019, 11:00am ET |
| Deadline for submission of RFP–related written questions | January 10, 2020 5:00pm ET |
| 1 PM ET Deadline for Receipt of Proposals (“Receipt”) | February 3, 2020 |
| Evaluation, Clarifications, Presentations, Best and Final Offer (BAFO), Negotiations and Letter of Intent (LOI) | April 17, 2020 |
| Acceptance and Execution of Agreement | June 1, 2020 |
| Implementation | July 1, 2020 |

9. Scope of Products and Services

The Respondent is expected to provide hosted cloud telecom and web conferencing solutions, including but not limited to:

- Hosted VoIP Unified Communication Solutions
- Web Conferencing/Video Collaboration Solutions
- VoIP Telecom and Video Conference Hardware/Software
- Contact Center Voice, Video and Messaging Solutions
- Pre-Sale Consulting, Implementation, Integration and Support Services

An ideal solution will have the ability to deliver the following capabilities:

- coexist with members’ existing PBXs
- adequately secured to comply with Federal and State laws and regulations as well as meeting accreditation and member requirements
- monitoring and notifications alerting institutional support staff of service issues upon start of an event
- provide a GUI interface for administration of user-level telephony configurations
- a platform that includes real-time video collaboration features
- a call center platform that integrates into the solution
- unlimited toll-free calling, similar to cellular phone calling plans

Suppliers must be willing to work with open lines of communication and deliver a responsive and caring attitude in their customer service. Proactive, meaningful communications and easily understood information is critical to our members’ satisfaction.

Supplier is expected to work with the member and service provider(s) to arrive at a single Service Level Agreement (SLA). The SLA provides a measurable framework for the service and clarity in request/event prioritization, agreed upon levels of downtime, support response and resolution times, etc. Members may expect a service performance tracking mechanism where the performance of the service is measured and reported.

RFP # 683381 – SPECIFICATIONS

All products offered under a resulting agreement shall be new, unused and currently available. Remanufactured or refurbished products are not acceptable, in lieu of new product, unless authorized by the member.

E&I recognizes that any one Respondent may not provide all product lines. No systems, products, or services have been excluded from this RFP. All product, supplies and accessories carried in a Respondent’s catalog(s), price book(s) or otherwise available by special order are part of this solicitation.

10. Evaluation Process

Any contract(s) resulting from this Request for Proposal will be awarded in writing to responsive and responsible Respondents whose proposal, in the opinion of the evaluation team, offers the greatest benefit to our members when considering the total value including the quality, service levels, customer service and total cost (including any trade, prompt payment discounts, and other miscellaneous charges).

All proposals should be complete to be considered responsive. If the proposal fails to conform to the requirements of the RFP, E&I and/or the RFP Team will determine whether the variance is significant enough to consider the proposal.

As part of the evaluation process, E&I may require a demonstration/presentation before the award is made and the demonstration/presentation may be considered as an additional factor in award. Selected Respondent(s) shall be given a script and/or instruction for the presentation in order to provide the evaluation team further insight regarding their proposal and to clarify any issues. Failure of a Respondent to conduct a presentation on the date scheduled may result in rejection of the Respondent’s proposal. In addition, E&I may decide to make site visits, as needed, during the evaluation process which shall be coordinated with the respective Respondent(s).

11. Evaluation Criteria

E&I Members have identified the following factors, in relative consideration, as important in evaluating the merits of an Agreement:

11.1 Pricing

- Pricing and Terms that provide for increased discounts and lower overall cost

11.2 Adherence to Terms & Conditions/RFP Specifications

- RFP closely aligns with Members’ institutional policies, federal, state, and local legal and regulatory requirements and policies
 - Form Certifications (Prerequisite #4)
- Acknowledgment and acceptance of Terms and Conditions
 - RFP – Standard Provisions (Prerequisite #2)
 - Requirements & Execution of Offer (Prerequisite #3)
 - Agreement Templates (Prerequisites #'s 5 & 6)
- Response to Specifications

11.3 Respondent’s Capabilities

- Order Placement/Payment
- Delivery/Installation
- Service, Support, Product Warranty and Maintenance
- Administration, i.e. Reporting Capabilities
- On-Line/Technological Capabilities, including electronic ordering, E-commerce, procurement cards, billing and access to Respondent’s electronic catalogs
- Environmentally sustainable products and solutions
- Supplier Diversity, including Historically Underutilized Businesses (HUBs), Minority and Woman-Owned Business Enterprises (MWBs) and Small Business Enterprises as defined by the Small Business Administration (SBA)

RFP # 683381 – SPECIFICATIONS

11.4 Breadth and Quality of Products/Services

11.5 Respondent’s Qualifications

- Financial Stability
- References
- Experience and Past Performance

11.6 Added Value Solutions/Incentives and other information as deemed relevant by E&I

12. Submission Instructions

Proposal responses shall be submitted exactly as outlined, and the required information shall be provided in the section under which it was requested by E&I. Respondents may not combine or reorganize the headings and/or requests for information, or indicate that the information will be included in another section. Proposal responses shall not refer E&I to any location outside the requested sections noted within the required format below (i.e. External website).

Note: If Respondent’s proposal deviates from these instructions, such proposal may, at E&I’s sole discretion, be rejected.

12.1 Upload Instructions

E&I utilizes an online electronic sourcing portal for accepting proposals digitally. We do not accept hard copy submissions or submissions through any other medium other than through E&I’s Electronic Sourcing Solution.

Your submission must be uploaded prior to the Close Date/Time as indicated in the Tentative Schedule of Events Section above. We strongly recommend that you give yourself sufficient time and **at least ONE (1) hour** before the Close Time to begin the uploading process and to finalize your submission.

- Each item of Requested Information is instantly sealed (no one from E&I can review) and will only be visible after the Close Date/Time. You may edit your submission as needed up to Close Date/Time.
- Responders may elect to utilize the import/export feature to export questions into Excel in order to work on responses offline and import into the system upon completion.
- Keep in mind that when answering questions in the provided text box within the system (if applicable) there is a limit to the number of characters you can use in your response. The dynamic character limit counter at the bottom of each text box will display the remaining characters available.
- Uploading large documents may take significant time, depending on the size of the file(s) and your Internet connection speed. The maximum upload file size is 50 MB. If your file is greater than 50 MB, you can either break it up into multiple files as there is no limit to the number of files less than 50 MB. Alternatively, you could also provide a link to an online file share location (i.e. Dropbox, Box, Google Drive, Microsoft OneDrive/SharePoint etc.).
- Please do not embed any documents within your uploaded files, as they will not be accessible or evaluated.
- Information submitted that is not requested by E&I may be considered to be supplemental and not subject to evaluation.
- **All sourcing event-related communications between Respondents and E&I is managed and tracked through a Q&A Board within the RFP event within E&I’s Electronic Sourcing Solution. Any questions relating to log-in issues or technical issues, including attachments, can be submitted to our third-party software host, Jaggaer via a Support Form:**

<https://go.jaggaer.com/SupplierSupportRequest.html> or via (800) 233-1121, option 2 then option 2.