

KENT STATE
UNIVERSITY

PROCUREMENT DEPARTMENT

REQUEST FOR PROPOSAL

ISSUED FRIDAY, MAY 8, 2009

SEALED PROPOSALS DUE NO LATER THAN 3:00 P.M. FRIDAY, MAY 29, 2009

**SUBJECT: RFP #793 TELECOMMUNICATIONS AND IT EXPENSE MANAGEMENT
SYSTEM, DIVISION OF INFORMATION SERVICES, KENT STATE UNIVERSITY, KENT,
OHIO 44242**

Sealed proposals must be received at the Procurement Department, located at Schwartz Center, Kent State University, Kent, Ohio, by the date and time specified above, and opened immediately thereafter for the same Request for Proposal above. Proposals received after that date and time will be returned unopened to the vendor.

Proposals are to be submitted in accordance with the enclosed Proposal Instructions and Specifications. There will not be a formal proposal opening.

Questions pertaining to any specifications contained herein should be directed to Janet A. Vacula at 330-672-9193.

The Procurement Department shall at all times reserve the right to reject any or all proposals, award partial proposals, waive any proposal informalities or irregularities, and request new proposals if doing so is deemed to be in the best interests of Kent State University.

KENT STATE UNIVERSITY PROCUREMENT DEPARTMENT



Janet A. Vacula
Senior Purchasing Agent

By signing this document, I am agreeing, on behalf of my firm, to the specifications of this Request for Proposal and accepting, without exception or amendment the Instructions, Agreement Terms, and Specifications as set forth in this document. Any and all Purchase Orders resulting from this Request for Proposal shall be subject to these Instructions, Agreement Terms and Specifications, as incorporated herein.

SUBMITTED BY: _____
(Company Name)

AUTHORIZED SIGNATURE: _____ DATE: _____

(Printed Name, Title)



**TELECOMMUNICATIONS AND IT EXPENSE MANAGEMENT SYSTEM, DIVISION OF
INFORMATION SERVICES, KENT STATE UNIVERSITY, KENT, OHIO 44242**

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SECTION I
PROJECT TIMELINE

All respondents are expected to adhere to the following timeline in completion of the Request for Proposal process:

- **Friday, May 8, 2009:** RFP Issued
- **Friday, May 29, 2009:** Proposals Due
- **Week of June 1, 2009:** Evaluation of proposals and selection for vendor interviews
- **Monday June 8, 2009 – Tuesday June 9, 2009 – Wednesday June 10, 2009:** Proposal Presentations
- **June 12, 2009:** Proposal Award
- **July 1, 2009:** Begin implementation

SECTION II

OVERVIEW

2.1 BRIEF OVERVIEW OF KENT STATE UNIVERSITY Founded in 1910, Kent State University is the largest public multi-campus system in Ohio in terms of the number of campuses (eight) and local communities served across Northeast Ohio. Kent State has a population of approximately 34,000 students, 3,300 full-time faculty and staff members, and 172,000 alumni. The University's annual budget is \$500 million, approximately 25% of which comes from the state of Ohio. Kent State is led by President Lester A. Lefton, who became the 11th President of Kent State in July 2006. Dr. Robert Frank, became the Senior Vice President for Academic Affairs and Provost on July 3, 2007.

The University's Kent Campus has a student body of 23,000 and a thriving residential population of 6,000. It provides the intellectual, scientific, social, economic, and artistic resources of a major research university in an extremely safe and serene campus setting. Seven regional campuses draw full and part-time students, now totaling about 1,000, from their communities: Ashtabula Campus, Ashtabula; East Liverpool Campus, East Liverpool; Geauga Campus, Burton; Salem Campus, Salem; Stark Campus, Canton; Trumbull Campus, Warren; and Tuscarawas Campus, New Philadelphia.

According to the Carnegie Commission on Higher Education, Kent State is one of 77 public research universities that maintain "high research activity". Other elements in the Kent Campus classification include its undergraduate instructional program, ("professions plus arts & sciences, high graduate coexistence"), its graduate program ("comprehensive doctoral, no medical/veterinary"), its enrollment profile ("high undergraduate"), its undergraduate profile ("full-time four-year, selective, lower transfer-in"), and size and setting ("large four-year, primarily residential").

Kent State is proud of its outstanding faculty, staff and students, collaborative culture, exceptional academic and research orientation, strong commitment to engagement, academic excellence, and diversity. KSU offers 32 associate, 272 baccalaureate, 214 masters, and 59 doctoral programs. Academic programs are organized into eight colleges: Architecture and Environmental Design; Arts and Sciences; the Arts; Business Administration; Communication and Information; Education, Health, and Human Services; Nursing; and Technology.

2.2 DIVISION OF INFORMATION SERVICES With a staff of more than 160 full-time employees and an annual budget of more than \$25 million, Kent State's Division of Information Services provides students, faculty and staff with support in the use of information technology for teaching, learning and research. Information Services is a strategic partner, helping academic and administrative units fulfill Kent State's mission of providing excellence in action every day through the delivery of innovative, technology solutions that meet the needs of the university.

The resources provided by Information Services include:

Application Services

Develops, implements and maintains innovative administrative application systems, including Banner, DARWIN and others.

FlashLine Services and Support

Develops and integrates applications and Web services, including My HR and FlashCart, which allow the Kent State community to enjoy single sign-on and authorization to multiple university services via the FlashLine portal.

E-Services

Creates workflows, document imaging and new technology solutions, including ePAF, expense reimbursement and graduate admissions, for numerous business needs.

Shared Services – Information Technology Solutions Partnership

Supports each university division by providing project management, reporting, application development and

maintenance (including projects such as FAMIS and development of a secure Web site for open enrollment) to allow for improved business processes.

Information Management and Access

Develops and maintains reporting databases and supports reporting application tools for Banner that provide meaningful information for decision-making and business analysis.

Educational Technology Enhancement Services

Collaborates with faculty members by providing training, support and development of multimedia tools to enhance the learning experience, while managing the faculty refresh program and providing installation and maintenance of classroom technology.

Security and Compliance

Protects the university's information technology assets and ensures the privacy of sensitive data by mitigating risk and liability associated with potential exposure.

End User Support

Provides support to the entire university community through the management of end-user computing environments, the maintenance of computer labs and person-to-person assistance via the University Helpdesk.

Networking and Telecommunications

Ensures connectivity for the university's many constituents through support of the Internet, wireless and voice networks.

Core Information Services

Provides support and maintenance of the information technology infrastructure, server system, file storage systems and data center and coordinates with the university's overall emergency preparedness efforts by planning for the recovery of technology assets and applications that could be lost in the event of a disaster.

SECTION III
REQUEST FOR PROPOSAL
INSTRUCTIONS AND AGREEMENT TERMS

3.1 PROPOSAL INSTRUCTIONS AND INFORMATION In order to receive consideration, companies responding to this RFP are required to submit **one (1) original and Seven (7) copies** of their response in a sealed envelope or package clearly indicating the contents, before and no later than the date and time specified on the RFP.

The coversheet, and all of sections IV and V must be completed, dated, and signed by a responsible company official, in addition to the information requested of your company. Respondents are required to submit their proposals to **Janet Vacula, Senior Purchasing Agent, by 3:00 p.m. Eastern on Friday, May 29, 2009** at the following address:

Kent State University
Procurement Department
229 Schwartz Center
P. O. Box 5190
Kent, OH 44242-0001

Directions to the Procurement Department may be found at www.kent.edu/frntMaps.

It is requested that those vendors who do not desire to submit information indicate the same by submitting a "No Response" to the Procurement Department.

It is the responsibility of the respondent to ensure that all required documentation, as enumerated above, arrives on time and at the designated location. Any submissions received after the stated date and time, or those that do not contain the required information as enumerated above, or the correct number of copies, will be considered incomplete and unresponsive, and will be disqualified.

This RFP is part of a competitive procurement process which helps to serve the University's best interests. It also provides contractors with a formal and unrestrictive opportunity for their services to be considered. The process of competitive negotiation being used in this case should not be confused with the process of competitive sealed bidding. The latter process is usually used where the goods and services being procured can be precisely described and price is generally the determinative factor. With a RFP and competitive negotiation, however, price is not required to be the determinative factor, although it may be, and the University has the flexibility to negotiate with one or more contractors to arrive at a mutually agreeable relationship. Check your proposal carefully for it may not be corrected after the proposal has been opened.

3.2 OHIO REVISED CODE 9.24 REQUIREMENT: FINDING FOR RECOVERY Ohio Revised Code 9.24 Requirement: Finding for Recovery Ohio Revised Code (ORC) Section 9.24 prohibits the State from awarding a contract to any offeror(s) against whom the Auditor of the State has issued a finding for recovery if the finding for recovery is deemed "unresolved" at the time of award. By submitting a proposal, the offeror warrants that it is not now, and will not become subject to an "unresolved" finding for recovery under ORC 9.24, prior to the award of any contract arising out of this RFP, without notifying the university of such finding. Furthermore, if the warranty is false on the date the offeror would sign an Agreement resulting from this RFP, such and any future Agreement is void *ab initio*, and the Contractor must immediately repay to the State any funds paid under any such Agreement.

"Contractor warrants that it is not subject to an "unresolved" finding for recovery under O.R.C. Section 9.24. If this warranty is found to be false, this Agreement is void *ab initio* and Contractor shall immediately repay to Agency any funds paid under this Agreement."

3.3 CAMPAIGN CONTRIBUTIONS “Contractor hereby certifies that all applicable parties listed in Division (I)(3) or (J)(3) of O.R.C. Section 3517.13 are in full compliance with Divisions (I)(1) and (J)(1) of O.R.C. Section 3517.13.”

3.4 CONFLICTS OF INTEREST AND ETHICS COMPLIANCE “No personnel of Contractor or member of the governing body of any locality or other public official or employee of any such locality in which, or relating to which, the work under this Agreement is being carried out, and who exercise any functions or responsibilities in connection with the review or approval of this Agreement or carrying out of any such work, shall, prior to the completion of said work, voluntarily acquire any personal interest, direct or indirect, which is incompatible or in conflict with the discharge and fulfillment of his or her functions and responsibilities with respect to the carrying out of said work.

Any such person who acquires an incompatible or conflicting personal interest, on or after the effective date of this Agreement, or who involuntarily acquires any such incompatible or conflicting personal interest, shall immediately disclose his or her interest to Agency in writing. Thereafter, he or she shall not participate in any action affecting the work under this Agreement, unless Agency shall determine in its sole discretion that, in the light of the personal interest disclosed, his or her participation in any action would not be contrary to the public interest.

Contractor represents, warrants, and certifies that it and its employees engaged in the administration or performance of the Agreement are knowledgeable of and understand the Ohio Ethics and Conflicts of Interest laws and Executive Order No. 2007-OIS. Contractor further represents, warrants, and certifies that neither Contractor nor any of its employees will do any act that is inconsistent with such laws and Executive Order. The Governor’s Executive Orders may be found by accessing the following website:

<http://governorohio.gov/GovernorsOffice/ExecutiveOrdersDirectives/tabid/105/Default.aspx>.”

3.5 DECLARATION REGARDING MATERIAL ASSISTANCE/NON-ASSISTANCE TO A TERRORIST ORGANIZATION “Contractor hereby represents and warrants to Agency that it has not provided any material assistance, as that term is defined in O.R.C. Section 2909.33(C), to any organization identified by and included on the United States Department of State Terrorist Exclusion List and that it has truthfully answered “no” to every question on the ‘Declaration Regarding Material Assistance/Non-Assistance to a Terrorist Organization.’ Contractor further represents and warrants that it has provided or will provide such to Agency prior to execution of this Agreement. If these representations and warranties are found to be false, this Agreement is void ab initio and Contractor shall immediately repay to Agency any funds paid under this Agreement.”

3.6 SUPPLIER DIVERSITY Kent State University encourages woman and minority groups to respond to university Requests for Proposals. Kent State University is committed to a proactive and a comprehensive supplier diversity program that ensures an active and full participation of historically disadvantaged, economically and socially underutilized businesses located within the university’s geographic region and beyond with specific attention to include Minority Business Enterprises (MBE) and Women-Owned Business Enterprises (WOBE). Information about Kent State University’s Supplier Diversity Program including the Vendor Registration Process can be found on the Procurement Department Web site at <http://www.kent.edu/procurement/supplierdiversity.cfm>.

Kent State University encourages the participation of women and minority groups in all university contracts. Kent State University therefore requires that all prospective suppliers demonstrate good faith efforts to obtain the participation of minority-owned and women-owned business enterprises in the work to be performed under university contracts.

The supplier shall furnish appropriate quarterly information about its effort to include women-owned and minority groups in the contract, including the identities of such enterprises and the dollar amount supplied under the contract.

A listing of Ohio certified minority businesses, as well as the services and commodities they provide, is available from the State of Ohio Minority Business Enterprise Unit and can be reviewed at <http://www.das.ohio.gov/Eod/EODMBEOff.htm>.

3.7 PROPRIETARY INFORMATION DISCLOSURE All responses and accompanying documentation will become the property of the university at the time proposals are opened, with the exception of any material marked as proprietary information as defined by Ohio Revised Code Section 149.43. All proposal materials are subject to disclosure under the Ohio Public Records Law (ORC 149.43) except proprietary information, which will be returned to the unsuccessful respondent at the respondent's request and expense, or be destroyed, at the conclusion of the selection process.

3.8 ADDITIONAL INFORMATION In the event that information submitted by the Respondent is unclear to the university, the university may request additional explanation from the Respondent for the purpose of evaluation and decisions. The respondent shall answer requests for additional information or clarification in writing, and these responses will become part of the company's overall submission. Respondents failing to provide adequate information on any issue in a timely manner to allow a comprehensive evaluation by the university shall be considered unresponsive, and their proposal subject to rejection.

3.9 VERBAL INFORMATION Respondents shall NOT base the proposal on verbal information from any employee of the University from the date and time the RFP is received by the proposer, unless otherwise noted elsewhere in the RFP. Any such incident will invalidate the proposal, and bar that particular vendor from receiving a purchase or contract award. In case errors or omissions are found in the proposal document, companies submitting proposals shall at once inform the signee in the Procurement Department who will publish the correction to all companies.

3.10 QUESTIONS BROUGHT BY PROPOSER It shall be the Proposer's responsibility to learn all aspects of the RFP requirements. Should any details necessary for a clear and comprehensive understanding be omitted or any error appear in the RFP documents, or should the Proposer note facts or conditions which, in any way, conflict with the letter or spirit of the RFP documents, it shall be the responsibility of the Proposer to obtain clarifications before submitting a proposal.

Questions should be submitted in the following format. Deviations from the format will not be accepted.

Section number
Paragraph number if applicable
Text of passage being questioned
Question

Questions may only be e-mailed to: Janet A. Vacula, Purchasing Agent at jvacula@kent.edu.

3.11 EVALUATION AND CONTRACT AWARD Selection and award of contract will be made to the supplier(s) whose proposal(s), in the sole opinion of Kent State University, represent the best overall value to the university. Factors which determine the award are more fully detailed in the specifications, and will include, but will not be limited to, the following: The proposer's responsiveness to all specifications in the RFP, quality of the proposer's products and/or services, ability to fulfill the contract, and general responsibility as evidence of past performance. Payment terms and cash discounts will be considered as determining factors in the contract award.

3.12 PROPOSER PRESENTATIONS Proposers submitting proposals which meet the selection criteria and which are deemed to be the most advantageous to the university may be required to give an oral presentation to the university selection team. Scheduling of these oral presentations will be done by the Procurement Department.

3.13 PROCEDURE FOR CONDUCTING NEGOTIATIONS

—Who To Negotiate With First

After completion of the initial evaluation process, the University may begin negotiations with one or more vendors whose proposals are most in keeping with the University's requirements as enumerated in the RFP. Notification of such negotiations will be offered after a reasonable amount of time has elapsed from the proposal deadline. Negotiations shall continue to the satisfaction of the University or, if the University determines a satisfactory agreement cannot be reached, the University may initiate negotiations with one or more of the remaining vendors.

—**Negotiations With Multiple Vendors**

The University reserves the right, at all times during the negotiation process, to negotiate with one or more vendors at the same time, but is under no obligation to do so.

The vendor(s) with whom the University enters into negotiations must have present a representative with decision-making authority.

—**If Negotiations Are Unsuccessful**

With respect to any of the services that are a part of this RFP, in the event that the University determines that a contract cannot be negotiated with any of the vendors who respond to the RFP, the University shall have the right to issue a new RFP or other process to seek qualified applicants, to provide the services itself, or to use another process (e.g., sole source contracting) in order to have the product(s) and/or service(s) provided.

3.14 VALID PROPOSALS Proposals will be considered valid for a period of sixty (60) days after the scheduled due date, unless otherwise noted.

3.15 PERIOD OF AGREEMENT The term of the agreement shall be negotiated after contract award to commence approximately July 1, 2009; A one (1) and/or up to three (3) year term should be offered.

3.16 CONTRACT EXTENSION It is understood and agreed that Kent State University reserves the right to extend the contract period a maximum of thirty (30) days beyond the normal expiration date of this contract. Any further extension as may be required shall be through mutual assent.

3.17 RENEWAL OF CONTRACT After the initial term, Kent State University reserves the right to renew this contract for additional terms, with mutual assent. Any renewal agreed upon shall occur ninety (90) days prior to expiration of the contract then in force.

3.18 TERMINATION Either party may terminate this contract after the expiration of sixty (60) days from the effective date of the contract. Termination may occur by giving the other party ninety (90) days prior written notice of intent to terminate; except that any breach of this contract shall be just cause to terminate immediately the contract and any obligations existing thereunder without any prior notice to you.

3.19 ESTIMATED REQUIREMENTS The university in no way obligates itself to purchase the full quantities indicated, but the entire amount of any discount offered must be allowed whether or not the purchases are less than the full quantities indicated. The university's requirements may be greater than or less than the quantities shown, and the successful proposer shall be obligated to fulfill all requirements as shown on the purchase orders whose mailing dates fall within the term of the contract.

3.20 PRIME CONTRACTOR RESPONSIBILITIES The selected contractor will be required to assume responsibility for all services offered in his proposal whether or not he produces them. Further, the University will consider the selected contractor to be the sole point of contact with regard to contractual matters.

3.21 PRICE AND FREIGHT All pricing must be quoted F.O.B. Destination, Kent State University, Kent, Ohio 44242. Include all freight, transportation, and any applicable handling and/or installation charges necessary to complete delivery on an F.O.B. Destination basis.

3.22 TITLE AND RISK OF LOSS Supplier shall retain title and bear the risk of any loss or damage to the items purchased until they are delivered at the specified FOB point; and upon such delivery, title shall pass and supplier's responsibility for loss or damage shall cease except as resulting from the supplier's negligence or failure to comply to all stated terms and conditions. Passing of title upon such delivery shall not constitute acceptance of the terms by Kent State University.

3.23 DUN AND BRADSTREET DATA Kent State University reserves the right to request data from Dun and Bradstreet concerning history of company's financial and payment statistics. Proposals from companies failing to provide the requested data to Dun and Bradstreet will not be considered.

3.24 AUDITS Kent State University reserves the right to perform audits as often as is deemed necessary by the University with 30 days advance notice. The University will utilize all invoicing and documentation, which relates to Kent State University's final cost. Kent State University personnel from The Division of Information Services, Procurement Department, and Auditing Department may perform these audits.

The company to be audited must provide access to files and information necessary to validate cost data and assist in the performance of each audit. Audit discrepancies must be resolved to the satisfaction of Kent State University. Kent State University reserves the right to terminate the partnership at any time if the audit results are not resolved to meet the requirements of Kent State University.

3.25 MARKETING/ADVERTISING No supplier providing products or services to Kent State University shall willfully obtain the name, identifying marks or property of Kent State University for its own promotional purposes.

3.26 USE OF DESIGNS Proposer agrees that it will keep confidential the features of any equipment, tools, gauges, patterns, designs, drawings, engineering data or other technical or proprietary information furnished by Kent State University and use such items only in the production of item(s) awarded as a result of the RFP and not otherwise, without the prior written consent of the university. Upon demand or completion of resultant purchase order, the proposer shall return all such item(s) to the university at the expense of the proposer, or make other disposition thereof as may be directed or approved by the university.

3.27 TIME IS OF THE ESSENCE Time is of the essence in completing this project. Any breach of the terms of this contract, including, but in no way limited to the time period of performance, will be just cause to terminate the contract without prior notice to the contractor. Termination resulting from breach will be cause, at the sole discretion of the university, to suspend the proposer from proposing on any project at the university for a period of up to three (3) years.

3.28 EXTENDED PAYMENT CLAUSE Kent State University may upon written notice to the proposer receiving the contract, suspend or terminate the unpaid balance of this contract, if the Ohio General Assembly, in a subsequent biennium, fails to appropriate funds making possible the continuation of such payment.

3.29 SALES TAX Kent State University is exempt from Ohio sales tax and federal tax and will furnish an exemption certificate upon request.

3.30 PREFERRED INVOICING AND PAYMENT METHODS The successful proposer(s) must invoice products or services awarded exactly as indicated on a resultant university purchase order, to include cost, unit specified, quantity ordered, item descriptions, etc.

Kent State University prefers to receive invoices for goods and services via electronic means. It is the goal of the university to make payment on invoices via Automated Clearing House (ACH) transfer. To that end, please indicate your company's capabilities for electronic invoicing and payment where appropriate in Section V of this document.

3.31 PAYMENT TERMS AND CASH DISCOUNTS Kent State University will endeavor to use any cash terms offered, and these could be considered in determining the final net price depending on the discount period.

In the event that Kent State University is entitled to a cash discount, the period of computations will commence on the date of delivery or receipt of a correctly completed invoice, whichever is later. If an adjustment is necessary due to damage, the cash discount period shall commence on the date final approval for payment is authorized. If a discount is part of the contract, but the invoice does not reflect the existence of a cash discount, the university is entitled to a cash discount with the period commencing on the date it is determined that a cash discount applies.

3.32 PERFORMANCE BOND The right is reserved to require a performance bond from the successful bidder within ten (10) days of the contract award in the amount of 100% of the contract price.

3.33 INDEMNIFICATION/HOLD HARMLESS Proposer shall indemnify and hold Kent State University harmless from and against all claims, losses, expenses, damages, causes of actions and liabilities of every kind and nature (including without limitation reasonable attorney's fees), arising out of any alleged breach of any proposer's obligations or warranties or from any other acts or omissions of contractor, its officers, agents, employees and subcontractors.

3.34 LIABILITY INSURANCE Since this transaction will involve labor, you hereby assure us that Workers' Compensation and the following minimum Liability and Property Damage Insurance will be in effect during the period you are doing this work: Five hundred thousand (\$500,000.00) dollars to any one person and subject to the same limit for each person in an amount of not less than one million (\$1,000,000.00) dollars on the account of any one occurrence, and five hundred thousand (\$500,000.00) dollars per occurrence for property damage. Before starting work on this project the successful proposer must send the Procurement Department evidence of Workers' Compensation and Liability Insurance in effect.

3.35 PERMITS, CERTIFICATES, ETC. The proposer shall obtain all permits, certificates of inspection, etc. relating to his/her work, and shall pay all charges connected therewith.

3.36 FEDERAL, STATE AND LOCAL LAWS The proposer shall in the performance of work or services on this job, fully comply with all applicable federal, state or local laws, rules, regulations and ordinances, and shall hold Kent State University harmless from any liability from failure of such compliance.

3.37 PARKING All contractors will be responsible for obtaining correct and current University parking permit requirements and to inform all employees of these requirements. Any questions pertaining to University parking regulations may be directed to Kent State University Parking Services.

3.38 EQUAL EMPLOYMENT OPPORTUNITY Kent State University is an Equal Opportunity Employer and as such makes the following request: The proposer, in submitting a proposal and /or filling a purchase order, agrees not to discriminate against any employee or applicant for employment with respect to hiring and tenure, terms, conditions, or privileges of employment, or any matter directly or indirectly related to employment, because of race, color, religion, gender, age, sexual orientation, national origin, disability, or identity as a disabled veteran or veteran of the Vietnam era to the extent required by law. The proposer must further agree that every subcontract or order given for the supplying of this order will contain a provision requiring nondiscrimination in employment, as herein specified. This covenant is required pursuant to Federal executive orders 11246 and 11375 and any breach thereof may be regarded as a material breach of the contract or purchase order.

3.39 PREFERENCE TO UNITED STATES AND OHIO PRODUCTS State of Ohio Am. H.B. 271 requires that preference be given to products produced or mined in the United States and in Ohio.

3.40 BUY AMERICA Proposals will be evaluated to determine that a proposer's offering is for a "domestic source end product", as defined in the Federal Buy America Act, 41 U.S.C.A., section 10a-10d. Any proposer's offering that does not meet this requirement shall be rejected, except in those circumstances where a determination has been made that certain articles, materials and supplies are not mined, produced or manufactured in the U.S. in sufficient and reasonably available commercial quantities and of satisfactory quality.

3.41 BUY OHIO Sections 125.09 and 125.11 of the Ohio Revised Code require that in the evaluation of bids, the University give preference to products which are "mined, excavated, produced, manufactured, raised, or grown in the state by a person where the input of Ohio products, labor, skill, or other services constitutes no less than 25% of the manufactured cost", or products offered by bidders who have a "significant Ohio presence," defined to mean that the bidders:

- Pay required taxes to the state of Ohio; and
- Are registered and licensed to do business in the state of Ohio with the Office of Secretary of State; and
- Have ten or more employees based in Ohio, or seventy-five percent or more of their employees based in Ohio.

Any bids meeting the above criteria will be given a preference of up to five (5) percent over the lowest price "non-Ohio" bid submitted; except that such preference will not be applied against vendors from bordering states, provided that the border state imposes no greater restrictions than contained in sections 125.09 and 125.11 of the Ohio Revised Code.

Where it has been determined that selection of the lowest Ohio proposer, if any, will not result in an excessive price or a disproportionately inferior product or service, the contract shall be awarded to the low Ohio proposer at the proposal price quoted. Where, it is advantageous to award the contract to other than an Ohio proposer or Proposers from a border state, then the contract shall be awarded accordingly.

SECTION IV

REQUEST FOR PROPOSAL SPECIFICATIONS

4.1 SCOPE Kent State University is requesting proposals from qualified vendors to receive the greatest value in a comprehensive, enterprise-class Telecommunications and IT expense management system. The system will enable Kent State University to manage all of their internal chargeback costs, vendor invoices and provisioning services with one new system. These charges will include internal network usage-based local calls, inter-lata and intra-lata calls over the public telephone network, cellular service charges – plus non-usage based charges such as data communications port, Internet, calling card, and equipment costs (including unique and one-time charges).

In addition to replacing our current functionality, the new system should improve financial and operational visibility into our enterprise and enhance our ability to analyze, document, and manage our IT and telecommunication resources. Our specific goals include the following:

Traditional Telecommunications

Chargeback Management – Collect and analyze Station Message Detail Recorder (SMDR) data; create and distribute bills via email and/or Web; export data to external systems; create detailed and summary call reports; and merge the data from multiple vendor bills into a single internal electronic invoice and automated integration to Sunguard Banner.

Telecom Resource Management – Monitor and analyze utilization of trunks leased from public telephone networks, and assist with tracking resource abuse and toll fraud.

Documentation – Track cable infrastructure distribution, use of cellular phones, calling cards and toll free numbers, and distribution of provisioned inventory and features.

E911 Management – Automatically create the Automatic Location Identifier (ALI) E911 NENA transaction records via the Telecommunications and IT expense management system.

IT Management Services

Chargeback Management – Facilitate chargeback activities for all IT-managed services and equipment: enterprise storage, backup services, consulting, printing, etc. This initiative must be completed by the 2009-2010 school year.

Personnel Resource Management – Schedule, track, and charge back for all labor, from communication services provisioning to consulting and programming.

The project's primary purpose is to migrate all chargeback activities and provisioned inventory information into a relational database. Our key objectives are to automate all current billing, provisioning, tracking, and inventory processes – and to provide value-added customer access to this information and functionalities via the Web (via self service and web-based billing).

The intent of these specifications is to have Kent State University enter into a contract with one qualified source – hereafter referred to as "Contractor" – who shall furnish all labor, software, materials, tools, insurance, ancillary equipment, project consulting, and all other items incidental to a complete installation and fully functional system. The Contractor shall perform all work necessary and specified for delivery of the system as described and identified in accordance with this RFP.

It is the policy of Kent State University to secure competitive bids for each procurement action. To prevent unnecessary expenses associated with the preparation and submission of any proposal, only firms with demonstrated experience in providing and supporting an enterprise-class Telecommunications and IT expense management system (including installation, maintenance, training, and support) are encouraged to respond to this RFP. Vendors are encouraged to submit your best, most realistic, and most competitive proposals.

Any oral explanations given before the award of the contract will not be binding on Kent State University. All additions, deletions, or changes to this RFP will be made by numbered RFP amendments and each amendment should be acknowledged in your proposal. Kent State University does not accept responsibility for information received by a prospective vendor which is not part of this RFP or its amendments (if applicable), or which is not released by the procurement officer.

4.2 BACKGROUND Kent State University provides communication and other IT support services to an internal customer support population of approximately 6000 persons located on 8 campuses. Our organization consists of 430 administrative units. The background of this RFP is that our current system used to manage communications costs is outdated, and is short on both capacity and capability as related to today's sophisticated and multi-facet communications media, tools, users, and other IT-provisioned systems. Our current system is augmented by several locally maintained spreadsheets, discrete databases, and locally supported applications with varying degrees of related and non-related information. Past and present data will need to be imported into the new system. This enterprise system must meet our current requirements and have the capacity for future growth and needs. It also must be flexible enough to handle new types of communications and IT support services. Kent State University is currently completing a complete communications audit. The new system will be required to accept the electronic data from this audit as a baseline for moving forward. The University would like to move quickly on this project so that the system can be put into place to keep the audited data up to date.

The current telephone system used by Kent State University incorporates 5,881 Analog and 5,387 Digital PBX over 964 circuits, plus ~500 cellular devices – all supported by ~20 telecom vendors. The new system should have the capacity for data from a minimum of twice the current needs.

4.3 VENDOR REQUIREMENTS

1. The vendor should provide all system source code, as well as an easy to use software development kit that can be used to manipulate the source code to fit the university's specific operational and business requirements.
2. The system must process all outbound, inbound, and station-to-station call data records for the current NEC 2400 switch.
3. The system must also simultaneously process all outbound, inbound, and station-to-station call data records for other vendor PBX switches. Please list.
4. This system will be required to interface seamlessly with Sunguard Banner.
5. The system must allow users or administrators to define which funds or accounts are assigned to which services. We need to bill a voice line, a landline, and a cellular phone all to different accounts on the same user without creating additional user records.
6. The system must provide a method to automatically update account numbers for every charge and every call record as account numbers are updated each fiscal year, or when grants expire.

7. The system must allow the university to publish our own suite of custom reports. The University does not wish to do complex manual table mappings to create these reports; therefore we require that the reports be written against standard database views, rather than individual tables. You must provide the ability to embed custom reports within the application itself. Reports must have the ability to automatically email the reports to anyone within the university based on schedules determined at the user level.
8. The system must authenticate users via the university's existing AD implementation.
9. The system must show only menus/functions specific to each end-user's job.
The system must store the user level configuration in the database to be presented via any web browser the user logs into, regardless of what machine they access the system from. Each individual employee should have the ability to modify their own display based on what works best for them.
10. The University requires the ability to find data quickly since most end-users execute a set of individual saved searches. The system should also provide the ability to present data in list format without searching.
11. The system must consolidate all documentation to a single interface. This documentation needs to be integrated and accessible within every screen of the application.
12. The university does not want a tremendous amount of user documentation, but would prefer to leverage online tutorials rather than reading mass amounts of text. To facilitate this, the system must provide the ability to access text, graphic, and multimedia-based documentation and help files from within any screen of the user interface.
13. The system will provide data-on-demand that can be quickly manipulated in a spreadsheet. The system should allow the user to specifically build a worksheet as they navigate the application, with different information from various repositories added to the worksheet on the fly.
14. The system must allow for easy-to-perform batch updates via the graphical user interface to eliminate repetitive manual activities when applying mass changes.
15. The university requires a tool with easy to use hot-keys that allow users to quickly navigate to specific functions inside of a fully web-based application.
16. As our users enter a tremendous amount of information, the system should not be mouse-dependant. Our users need to be able to 'tab through' the screens inside of a fully web-based application.
17. The system should consolidate many static reports into a single interactive graphical presentation, or dashboard. Dashboards should be dynamic and provide ability for trend analysis and predictive modeling.
18. The university requires a solution that can be easily migrated from a hosted solution to an in-house solution and visa-versa. This must be done via a database extract and re-import not via a complete system implementation. Please detail the process and estimated time to complete.
19. The vendor must be ready to begin the implementation by July 1, 2009, as this project needs to be completed for the 2009-2010 school year.

4.2 EVALUATION CRITERIA Proposals will be evaluated according to the following criteria listed here in random order:

- A. Delivery – Licensed
- B. Delivery – Hosted
- C. Delivery – Managed
- D. Delivery – Move back and forth
- E. Operations – Service Desk
- F. Operations – E911
- G. Operations – Infrastructure
- H. Operations – Inventory
- I. PBX Call Accounting
- J. Vendor Invoice Management
- K. Departmental Charge Back
- L. Optimization
- M. Service Configuration
- N. Data Access & Security
- O. User Interface
- P. Application Integration
- Q. Vendor Requests, Tickets CSRs
- R. Management PBX, Voicemail
- S. Pricing
- T. Delivery & Installation
- U. Warranties & Maintenance
- V. Terms and Conditions
- W. References/Past Experience

4.3 FORMAT AND CONTENT OF PROPOSALS To respond to this RFP, submit seven (7) copies of the Proposal on or before the submission deadline. The proposal must be signed by a person authorized to bind the proposing firm to the representations, commitments and statements contained in this response. The response must contain the following information and documents:

- Company History
- Qualifications Statement – This should be limited to a one-page document that articulates why your firm has the ability to manage Kent State University's communications needs.
- Implementation approach
- Functional highlights
- Up to three references – local references or higher education references encouraged
- Section V Request for Proposal Response Proposal Form and Pricing Sheet

SECTION V

REQUEST FOR PROPOSAL RESPONSE AND PROPOSAL FORM

By signing below, Contractor warrants that it is not subject to an unresolved finding for recovery under ORC 9.24. If the warranty is false on the date the parties sign an Agreement resulting from this RFP, such and any future Agreement is void *ab initio*, and the Contractor must immediately repay to the State any funds paid under any such Agreement.

PAYMENT TERMS AND CASH DISCOUNTS: _____

FEDERAL TAX ID No. OR SOCIAL SECURITY No.: _____

FIRM NAME: _____

ADDRESS: _____

WEB SITE: _____

E-MAIL ADDRESS: _____

TELEPHONE No.: _____

FAX No.: _____

AUTHORIZED SIGNATURE: _____

NAME OF SIGNEE: _____

TITLE: _____

DATE: _____

*All proposals submitted are taken by the university as offers to sell by the proposer and acceptance shall occur only by the issuance of a university purchase order or where appropriate, upon the execution of a written contract.

ELECTRONIC INVOICING AND PAYMENT CAPABILITY

All bidders are required to complete the following information:

1. Does your company offer electronic invoicing? ☐ Yes ☐ No

If yes, please specify method:

2. Is your company capable of receiving payment via ACH transfer? ☐ Yes ☐ No

BUY OHIO BIDDER AND PRODUCT INFORMATION

All bidders are requested to complete the following information:

1. ☐ Bidder is an Ohio vendor.
2. Bidder qualifies as an Ohio bidder because it:
 - A. ☐ Is offering an Ohio product.
 - B. ☐ Has a significant Ohio economic presence.
 - C. ☐ Is located in a border state (Kentucky, Michigan, New York, or Pennsylvania) that imposes no greater restriction than contained in section 125.09 and 125.11 of the Ohio Revised Code.
3. ☐ Bidder does not qualify as an Ohio bidder.
4. All products offered in this bid are Ohio products except those listed below:

BUY AMERICAN CERTIFICATE

The Bidder or Offeror hereby certifies that each end product, except the end products listed below, is a domestic source end product as defined in the Buy America Act; and that components of unknown origin have been considered to have been mined, produced, or manufactured outside the United States:

Certified:

Name *(Please Print)*

Signature

Date

Title

Note: Any questions regarding the above should be directed to: Kent State University,
Procurement Department, 330-672-2276.

PRICING SHEET

Please provide to Kent State University your Best and Final Pricing for all above mentioned requirements and services.

- | | | |
|----|---|-------|
| 1) | License Software | |
| a. | License Fee | <hr/> |
| b. | Professional Services and Implementation Fees | <hr/> |
| c. | Device Equipment Cost | <hr/> |
| d. | Maintenance Fees | <hr/> |
| | | |
| 2) | Hosted Solution | |
| a. | One time Setup Fee and Implementation Costs | <hr/> |
| b. | Monthly Recurring Fee for Services | <hr/> |

SECTION IV **DEFINITIONS**

Relative to this document, and any addenda incorporated herein, the following definitions apply.

Addendum(a): Written instruments, issued solely by the Kent State University Procurement Department (KSUPD), that detail amendments, changes, modifications, or clarifications to the specifications, terms and conditions of this Request for Proposal (RFP). Such written instruments shall be the sole method employed by the KSUPD to amend, change, modify or clarify this RFP, and any claims (from whatever source) that verbal amendments, changes, modifications or clarifications have been made shall be summarily rejected by the KSUPD.

Agreement, Contract, Purchase Order: Formal award resulting from the RFP.

Design Services: Engineering and/or architectural services which include the conceptual development, proposed design and/or actual plan drawings, blueprints and/or other schematics to produce a scope of services and work.

FOB: “Free on Board”; without charge to the purchaser for delivery on board or into a carrier at a specified point or location.

KSU: “Kent State University”

KSUPD: “Kent State University Procurement Department”

May, Should: Indicates something that is requested but not mandatory. If the Bidder fails to provide information, the KSUPD may, at its sole option, either request that the Bidder provide the information, or evaluate the Proposal without the information.

Proposal Closing Date: The date and time specified in the RFP by which a sealed proposal must be received by the KSUPD. Proposals received after the stated date and time will not be considered.

Proposal Issue Date: The date and time the RFP process is opened for submission by prospective vendors.

Proposal, Quotation: Response provided by proposer.

Proposer, Vendor, Supplier: Respondent to the RFP or RFQ.

RFP: “Request for Proposal”

RFQ: “Request for Quotation”

Shall, Must, Will: Indicates a mandatory requirement. Failure to meet mandatory requirements will invalidate the proposal, or result in the rejection of a proposal as non-responsive.