

RFP# 2017-06-02

REQUEST FOR PROPOSAL

CONSULTANT SERVICES

FOR

MICROSOFT SHAREPOINT ONLINE 2016

PLANNING, DESIGN, DEVELOPMENT, DEPLOYMENT &  
IMPLEMENTATION SERVICES



# Table of Contents

<b>1. INTRODUCTION</b> .....	4
<b>1.1 STATEMENT OF PURPOSE</b> .....	4
<b>1.2 NEEDS FOR PROJECT</b> .....	4
<b>1.3 BACKGROUND INFORMATION</b> .....	4
<b>1.4 SCLS' INFORMATION TECHNOLOGY INFRASTRUCTURE</b> .....	5
<b>1.4.1 NETWORK INFRASTRUCTURE</b> .....	5
<b>2. PROJECT SCOPE OF WORK</b> .....	6
<b>2.1 OVERVIEW</b> .....	6
<b>2.2 FUNCTIONAL REQUIREMENTS DOCUMENT</b> .....	7
<b>2.3 ARCHITECTURAL DESIGN AND IMPLEMENTATION</b> .....	8
<b>2.4 DESIGN USER INTERFACE OF SHAREPOINT INTRANET PORTAL</b> .....	8
<b>2.5 TYPES OF SOLUTIONS NEEDED</b> .....	8
<b>2.6 DELIVERABLES</b> .....	11
<b>2.7 GOVERNANCE PLAN</b> .....	11
<b>2.8 GENERAL BIDDING REQUIREMENTS</b> .....	12
<b>3. GENERAL TERMS AND CONDITIONS</b> .....	13
<b>3.1 PROPOSAL SUBMITTAL REQUIREMENTS</b> .....	13
<b>3.2 COST OF PROPOSALS</b> .....	15
<b>3.3 RIGHT OF REJECTION</b> .....	15
<b>3.4 INSURANCE REQUIREMENTS</b> .....	15
<b>3.5 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION</b> .....	15
<b>3.6 STATEMENT OF CONFIDENTIALITY</b> .....	16
<b>3.7 NOTIFICATION OF SUCCESSFUL VENDOR(S)</b> .....	16
<b>3.8 PROPOSED TERMS OF CONTRACT</b> .....	16
<b>3.9 SECURITY AND CLEARANCES</b> .....	16
<b>3.10 ADDITIONAL INFORMATION FOR THE PROVIDERS</b> .....	16
<b>3.11 QUESTIONS AND INQUIRIES</b> .....	17
<b>3.12 CONTRACT TYPE</b> .....	17
<b>3.13 PAYMENT TERMS</b> .....	17
<b>3.14 RFP REVISIONS</b> .....	17
<b>3.15 SUBMISSION DEADLINE</b> .....	17

3.16 DURATION OFFER .....	17
3.17 TERMS AND CONDITIONS .....	18
4. RFP PROCESS AND SCHEDULE .....	19
5. PROPOSAL FORMAT .....	20
5.1 GENERAL .....	20
5.2 PROPOSAL FORMAT .....	20
5.2.1 COVER LETTER .....	20
5.2.2 EXECUTIVE SUMMARY .....	20
5.2.3 COMPANY BACKGROUND AND HISTORY .....	21
5.2.4 EVIDENCE OF RESPONSIBILITY .....	21
5.2.5 PROJECT APPROACH / MANAGEMENT .....	21
5.2.6 PROJECT UNDERSTANDING .....	21
5.2.7 REFERENCES .....	22
6. EVALUATION CRITERIA AND SELECTION PROCEDURE .....	23
6.1 EVALUATION COMMITTEE .....	23
6.2 EVALUATION PROCESS .....	23
6.3 EVALUATION CRITERIA .....	24
APPENDIX A. SPECIAL TERMS AND CONDITIONS .....	25
APPENDIX B. DESCRIPTION OF COMPANY AND COMPANY'S QUALIFICATIONS .....	32
APPENDIX C. REFERENCES .....	34
APPENDIX D. CERTIFICATE OF INSURANCE COVERAGE .....	35
APPENDIX E. COST PROPOSAL FORM .....	36
APPENDIX F. QUOTATION PAGE/BID FORM – PRICING .....	37

# 1. INTRODUCTION

## 1.1 STATEMENT OF PURPOSE

South Carolina Legal Services (SCLS) is seeking proposals from qualified vendors that have extensive experience with all aspects of SharePoint implementation. Consultant services are required in the areas of: planning, design, documentation, development, deployment and implementation services for Microsoft SharePoint Online 2016 (SharePoint). The overall goal of SCLS is to enhance and improve the effectiveness and efficiency of the delivery of client services as well as improve SCLS' business processes and workflows.

This RFP provides the requirements and evaluation criteria for implementing SharePoint. SCLS requests detailed responses from all prospective qualified vendors, including pricing and service descriptions, in a specified format. SCLS will conduct a review of the responses received from this RFP with the intention of contracting with a vendor with extensive experience with SharePoint requirements as set out in this RFP; consultant experience with API integration with a Linux web-based system is also a requirement.

## 1.2 NEEDS FOR PROJECT

To achieve this goal, our objectives are to:

- (a) Automate business processes and work flows for departments;
- (b) Integrate SharePoint Online 2016 API with SCLS' web-based Linux case management system's API;
- (c) Establish an efficient document management process throughout the firm;
- (d) Establish a global home page with content targeted to SCLS staff;
- (e) Provide a structured taxonomy and metadata for five (5) departments;
- (f) Improve communication between departments and employees;
- (g) Improve productivity of employees by simplifying and improving access to business systems; and
- (h) Implement enterprise search capabilities – to promote better collaboration between legal advocates

## 1.3 BACKGROUND INFORMATION

SCLS is a 501(c)(3) non-profit statewide law firm that provides free legal services in a wide variety of civil (non-criminal) legal matters to eligible low income residents of South Carolina. SCLS serves residents of all areas of the state with field offices located throughout South Carolina. SCLS is funded by grants from the federally funded Legal

Services Corporation, the South Carolina Bar Foundation, local United Ways, state court filing fees, and other federal, state and local funding.

Total number of persons employed by SCLS' is approximately 120. Total number of offices is ten (10), one being our statewide Intake Office. For more information about SCLS, please visit our website at: <http://www.sclegal.org>

## **1.4 SCLS' INFORMATION TECHNOLOGY INFRASTRUCTURE**

### **1.4.1 NETWORK INFRASTRUCTURE**

- a. SCLS has nine (9) law offices statewide and a centrally located statewide intake office. All SCLS offices are connected via a wide area network (WAN) and is configured on an MPLS platform that connects all offices for data access. Our WAN includes 200+ devices (including computers, laptops, servers and tablets). Each office has 10 MB of fiber for voice/data, with an additional 100 MB fiber available, off-site. SCLS uses a premised based VOIP phone system, using Asterisk PBX built on the Linux platform.
- b. SCLS' network is protected by the following systems:
  - i. Sophos (UTM) secure gateway application as a firewall for: VPN access, intrusion/detection prevention, web browsing, web content filtering, network protection/visibility, anti-spyware, botnet prevention, and content management and authentication services.
  - ii. Barracuda Spam Firewall – email and spam filtering
  - iii. Multiple DC, GC and DNS servers
  - iv. Domain Controller Local domain controllers (Windows Server 2008 AD)
- c. SCLS has the following software installed:
  - Directory Services - Active Directory
  - Exchange Server 2013
  - Bit Defender Security Manager AV Defender
  - Microsoft Office Professional 2013
  - IPSwitch Instant Messaging (Internal Only)
  - Windows File Server 2008

## 2. PROJECT SCOPE OF WORK

### 2.1 OVERVIEW

SCLS is seeking proposals from qualified vendors that have extensive experience with all aspects of SharePoint implementation. Consultant services are required in the areas of: planning, design, documentation, development, deployment and implementation services for Microsoft SharePoint Online 2016 (SharePoint), with an emphasis on implementing SharePoint as a secure, corporate intranet, document management, business process management (BPM) and business intelligence solution.

The desired outcomes of a SharePoint Online 2016 implementation are a solution that: (a) eliminates and/or minimizes paper documents and manual processing; (b) improves unstructured information management capabilities (reducing the redundancy of business documents and frequent email transfers); (c) accelerates workflow throughput; (d) improves collaboration capability between departments; (e) provides all departments within the organization more cost effective access to documents and related information; (f) supports integration of tools (including API) and data specifically with MS Office and web-based Linux Case Management system.

SCLS will review all RFP responses from individual vendors/companies seeking to provide SCLS with specifics on how they would meet our goal and requirements. As part of the deliverables for this contract award, the selected vendor/company will be expected to provide detailed documentation of recommendations tailored to the goals and infrastructure of SCLS, risks and return on investment (ROI) for the following areas:

1. **Technical Architecture** – should define the hardware and software configuration necessary to satisfy functional requirements and
  - The contractor will provide recommendations for implementing and managing one or more SharePoint sites;
  - The contractor shall provide SCLS with documentation and recommendations for site configuration, security and administration, documenting how users, network, applications and overall information security will be managed and maintained across SCLS' MPLS network;
  - The contractor will document internal processes and maintain technical documentation throughout the project;
  - The security document will include the overall strategy for establishing the use of Windows Active Directory and SharePoint permissions;

- The contractor will recommend the process for application migration from existing Microsoft applications to SharePoint Online and Office 365;
- The contractor will assist with documentation related to search options within and across sites - providing an efficient foundation that enables advocates to seamlessly store, search, locate and share documents statewide
- The contractor will assist with choosing, developing and deploying web parts
- The contractor should make SCLS aware of any third party tools or software required to accomplish the project;

## 2. Organizational

- Visioning through specific areas of the organization, i.e. technology committee, substantive unit heads, and management.
  - Serve as the lead project manager/consultant during SharePoint Online 2016's project implementation and provide SharePoint development and support;
  - Collaborate with project team, department heads, advocates and USC interns to understand SCLS' needs and translate those needs into technical requirements utilizing the most effective and efficient processes/solutions;
  - Research new technologies, looking for ways to improve the overall effective and efficient use of SharePoint's technology for SCLS;
  - Capture ideas for using SharePoint Online 2016
  - Catalog and structure the types of ideas
  - Provide an overview of what your clients have successfully done by category

## 2.2 FUNCTIONAL REQUIREMENTS DOCUMENT

The *Functional Requirements Document* should capture uses cases for utilizing Sites, Content, Search, high level site layout, branding and requirements for performance, capacity, security and availability. Search will include external files and/or databases. The *Functional Requirements Document* should capture high level information concepts (e.g. Employee, Department, Policy, Procedures, etc.) and be traceable to specific business capabilities and/or business objectives. The Vendor will deliver an Information Architecture which will include a Taxonomy, Site Folder Structure, User and Group Access, Roles, and Permissions, Metadata, Data Structure, Search, Web Services, Role Based Security, Access ( Inter, Intra, Extranet ), and Application Integration. All work will be conducted according to SCLS Policies and Procedures, which will be shared with the winning vendor.

## 2.3 ARCHITECTURAL DESIGN AND IMPLEMENTATION

- A. The contractor shall review the current logical and physical architecture of SCLS' Wide Area Network
- B. In collaboration with SCLS' project team, draft an implementation plan that addresses the needs of SCLS
- C. The contractor shall allow for migration, consolidation, taxonomy and indexing of documents and data to a SharePoint Online 2016 deployment, that includes configuration and analysis based on all program requirements, goals for usage
- D. The solution shall be fully integrated with Active Directory users and groups, Microsoft Office Web App and Microsoft Exchange 2013

## 2.4 DESIGN USER INTERFACE OF SHAREPOINT INTRANET PORTAL

- A. Design a dynamic home page that aligns with SCLS' objectives
- B. Design team site templates that meets SCLS advocacy and departmental needs
- C. Implement/Integrate shared Outlook Calendar showing availability of internal resources. Examples include: conference room availability, grant reporting schedules, organizational-wide events, internal department events, etc.

## 2.5 TYPES OF SOLUTIONS NEEDED

- A. **Document Management** – SCLS' current process for managing documents consists of a local file server in each office with an off-site domain controller that manages the local network servers and controls active directory group policies. There are no standardized processes for document storage/retention, filing systems and maintaining up-to-date document versions. Historically, SCLS has struggled with an efficient, effective manner in which to organize, store, access, search and maintain documents firm wide. Our processes of document management is very cumbersome and unorganized. SCLS needs a system/platform to facilitate efficient file sharing and tracking, such as version control, revision history, check-in and check-out processes, document libraries, and data classification.

- o **Contractor Requirements**

The contractor shall provide a full SharePoint Online 2016 platform based on organizational needs that deliver the following:

- 1. The Solution must demonstrate core capabilities for the full information management lifecycle from inception to archive (or deletion), while providing specific access controls.

2. The contractor must collaborate with SCLS' database vendor to connect SharePoint's API to interface with SCLS' existing web-based Linux case management system's API.
3. The solution must provide the ability to classify documents with metadata to make them easier to search and ensure a mandatory amount of metadata is captured for each document or record in the library.
4. The solution must enforce adherence to document and record naming conventions or standards.
5. The Solution shall provide retention policies for record conversion, archival and deletion which can be set on a document type and executed automatically based on a pre-configured date.
6. The contractor shall migrate corporate file server data (as identified and outlined by SCLS) to SharePoint and shall permit navigational security, with multiple layers of user definable security to limit access.
7. The solution must provide users with the ability to combine and aggregate files into their own personal "virtual" folders. (OneDrive for Business).
8. The solution shall permit for electronic signature management - support for inserting signatures and managing records content and access.
9. The solution must provide the capability for the creation of Online forms where users can request support from various internal services. The form should be compatible with desktop and portable devices.
10. The solution must provide the ability to leverage multi-function machines' scan function to import scan document from Sharp and Konica Minolta MFP copiers to libraries and sites. As documents are scan to the library, they are automatically renamed according to the naming pattern determined by the Library Administrator.

B. **Business Process Management (Work Flow)** – current business processes and work flows are not automated, integrated or efficient. To process a simple document can include numerous steps, including signing, printing, signing again, copying, emailing, etc. Implementing an automated system that integrates our legal information and documents, grants management, calendaring, reporting, accounting, human resources and technology departments into one platform will enable SCLS to enhance and improve the effectiveness and efficiency of client services and business processes.

- o **Contractor Requirements**

1. The Contractor shall review all relevant existing documented “as-is” processes, workflow diagrams, documents, documentation of all existing SCLS systems, program functions to determine and address technical and user needs.
2. The Contractor shall provide a comprehensive document and records management solution that integrates with Microsoft Office, and utilizes online forms and workflow automation.
3. The Solution shall provide a workflow feature having automatic event notification via email, workflow features which can be automated for a specific document type and workflow template.
4. The Solution shall permit user involvement during the workflow instances, e.g., review workflow status, re-assign work tasks, re-prioritize tasks, cancel tasks and monitor audit trail.
5. The Solution shall permit specific users to act as observers of review or approval workflows. Observers can track the progress of documents as they proceed through the workflow and view any comments and feedback.
6. Users participating in review or approval workflows are provided with a personalized task list for all tasks assigned to them.
7. Users should be able to view at a glance their tasks, a description of the work to be done, who assigned the task and it needs to be completed.
8. The solution should have the capability to convert MS Office documents to PDF with the electronic signature option.

C. **Portal/Intranet** – SCLS maintains a web-based staff intranet which is seldom used by staff; our brief bank became stagnant some time ago and is seldom used by the advocates because of its antiquity, lack of indexing and the inability to search using web tools. A system that integrates taxonomy, metadata and optimum search-ability will promote efficiency related to discovery, collaboration, etc. Survey results show that 53% do not use the existing brief bank because of lack of indexing and search ability problems.

D. **Collaboration** – Because of the lack of indexing and minimal search capabilities, document collaboration among legal advocates has been inefficient and ineffective. Survey results show that 83% of legal advocates use email as a collaborative tool; advocates primarily use email and list serves for sharing documents; version control and numerous email threads are problematic. The average time spent on legal research is at least 3 hours for a complex case;

## **E. Change Management**

- Develop and update project plan and communicate statuses to project team;
- Document internal processes and maintain Change management approaches to maximize gains and minimize resistance from end-users
- Establish governance policies to guide staff on how SharePoint Online expands our technology portfolio

1. The selected vendor should have the following skills and experience:

- Experience working with governmental, non-governmental and non-profit clients of similar size
- Experience implementing SharePoint Online and Office 365 in more than three organizations and/or businesses with diverse goals and experiences, resulting in a robust “Lessons Learned” knowledge base
- Staff with both technical and non-technical backgrounds to provide guidance in all areas from the purely technical to enhancing the end user experience.

## **2.6 DELIVERABLES**

- a. The contractor shall arrange a Project Kickoff Meeting. The Project Kickoff meeting will occur no later than 30 days following the award of the contract.
- b. The contractor shall provide SCLS with an Initial Work Plan within the proposed RFP response.
- c. A formal Work Plan is to be initially delivered within ten (10) days following the award of the contract to include a detailed task by task level work breakdown structure and schedule. In addition, the contractor shall deliver:
  - i. an optimal functioning SharePoint Online 2016 platform for SCLS to include -
  - ii. an integrated SharePoint Online 2016 API integration with SCLS existing Linux web-based case management system
  - iii. a document management system
  - iv. a corporate intranet site with BPM integration as outline in the Scope of Work – with established workflow processes

## **2.7 GOVERNANCE PLAN**

The contractor shall provide a Governance and Security Plan which define the rules, procedures, security and roles necessary for a successful SharePoint platform, site administration and growth. A recommendation of minimal and optimal staffing for the SharePoint system as designed should also be included. SCLS would also like recommendations for future governance planning.

## 2.8 GENERAL BIDDING REQUIREMENTS

When responding to this RFP, please follow all instructions carefully. Please submit proposal contents according to the outline specified and submit all electronic documents according to instructions. Failure to follow the instructions contained in this RFP will be considered a non-responsive proposal and may result in immediate elimination from further consideration. **Email: [patmuller@sclegal.org](mailto:patmuller@sclegal.org)**

By submitting a response to this RFP, respondents are acknowledging:

2.8.1 SCLS reserves the right to reject any or all proposal responses if it determines that select vendor responses are not responsive to the RFP. SCLS reserves the right to reconsider any proposal submitted at any phase of the procurement. SCLS also reserves the right to meet with select Proposers at any time to gather additional information. Additionally, SCLS reserves the right to delete or add functionality up until the final contract signing.

2.8.2 All Proposers submitting RFP responses agree that their pricing is valid for a minimum of one (1) year after proposal submission to SCLS. Pricing must be submitted on a “firm-fixed-price” basis. A “firm-fixed-price” proposal requires delivery of a product or services at a specified price, fixed at the time of the contract award. Payment will be tied to the agreed upon project milestones based on contract discussions with the selected vendor. Any RFP response that does not outline pricing on a “firm-fixed-price” basis, may be eliminated from further consideration.

### 3. GENERAL TERMS AND CONDITIONS

This RFP is not a contract offer. Receipt of a proposal neither commits SCLS to award a contract to any Vendor, nor limits our rights to negotiate in our best interest. SCLS reserves the right to contract with a Vendor for reasons other than price. Failure to address any section or answer any question(s) in this RFP may subject the proposal to disqualification. SCLS reserves the right to request additional information that is necessary and pertinent to the project or to assure that the Vendor's adequate competence to perform according to the bid specifications are met.

Products and services which are not specifically requested in the RFP but which are necessary to provide the functional capabilities proposed by the Vendor shall be included in the proposal response.

#### 3.1 PROPOSAL SUBMITTAL REQUIREMENTS

Notice is hereby given that Request for Proposals (RFP) responses must be received on or before **Wednesday, March 8, 2017, by 4:30 PM (EST)**, via email. **Email:** [patmuller@sclegal.org](mailto:patmuller@sclegal.org)

To facilitate the analysis of the responses to this RFP, Proposers are required to prepare their responses in accordance with the instructions outlined in this section and elsewhere in this RFP.

- (a) The bid proposal must bear your official letterhead, clearly identifying your company.
- (b) Bids must be submitted electronically and all attachments should be in PDF format.
- (c) Proposals shall include a letter of transmittal signed by an authorized representative of the bidding company. All information requested should be submitted.
- (d) Bid proposal responses must be submitted containing the entire contents of your proposal to the email address shown above. Failure to submit all requested information may result in SCLS requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal.
- (e) Proposals should be prepared simply, as thorough and detailed as possible providing a straightforward, concise description of vendor's capabilities to satisfy the requirements of the RFP to enable SCLS to evaluate your capabilities to provide the requested product and services.
- (f) All responses are to be submitted on standard 8.5" X 11" paper in 12 pt. minimum type. Bidders shall respond to the items in the order they are shown in the RFP. Proposals should describe the most favorable terms and shall remain firm for 120 days from the bid opening date.

- (g) Ownership of all data, materials and documentation originated and prepared for this RFP solicitation by any proposer/vendor shall belong exclusively to SCLS.
- (h) The proposal shall be labeled "Microsoft SharePoint Online 2016 - Consultant, Planning, Design, Documentation, Development, Deployment & Implementation Services, and RFP# 2017-06-02", delivered via email and addressed to::

**Email Address:**  
[patmuller@sclegal.org](mailto:patmuller@sclegal.org)

Pat Muller  
Information Technology Manager  
South Carolina Legal Services  
2109 Bull Street  
Columbia, SC 29201

- (i) Prospective respondents may request clarification to this RFP only by submitting a written request via email to the above-mentioned contact. SCLS will only provide answers in the form of a written addendum to this RFP. All questions must be received via email no later than **2:00 EST on February 21, 2017**. Any vendor who wishes their proposal to be considered is responsible for making certain that their response is received by the deadline.

SCLS will not be held responsible for the failure to deliver a proposal response prior to the stated proposal due date and time. It is solely the proposer's responsibility to: (1) ascertain that they have submitted all required and necessary information, documents and addenda, prior to submitting a response; (2) ensure that their response is received in the correct format as indicated by the 'Proposal Submittal Requirements'.

It is your responsibility to verify that all emails have been received properly before the deadline. Please be aware of the fact that SCLS' email policy for attachments limits the size of attachments to a maximum of 10MB, so it may be necessary to send more than one email for your entire submission.

Please indicate in the email subject field:

- Bid reference: RFP# 2017-06-02
- Name of your company
- Reference the number of emails sent (i.e., 1 of 2, 1 of 3)
- Title attachments to coincide with bid reference

**IMPORTANT:** Please note: late responses will not be accepted.

Vendors may view and download this Share Point RFP document on SCLS' website at:

<http://www.sclegal.org/Home/RequestForBids/tabid/2442/language/en-US/Default.aspx>

### **3.2 COST OF PROPOSALS**

Any and all expenses incurred in the preparation of proposals in response to this RFP are the sole responsibility of the Vendor, including, but not limited to any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to SCLS and/or its representatives. Additionally, SCLS reserves the right to cancel the work described herein prior to the issuance and acceptance of any contractual agreement/purchase order by the recommended proposer.

### **3.3 RIGHT OF REJECTION**

SCLS will review the proposals for compliance with the procedural requirements set forth in this RFP and will reject any proposal that fails to meet the minimum bid requirements. Any deviation from the performance requirements or other terms of the RFP, informalities or defects, if in substantial compliance with the terms and intent of the RFP, may be accepted by SCLS at its discretion.

SCLS reserves the right to accept or reject any and all proposals, or any part of any proposal, without penalty. In addition, SCLS reserves the right to fund (and proceed with project or purchase), not to fund the project, or to partially fund the project. Any allowance for oversight, omission, error, or mistake by the Vendor made after receipt of the proposal will be at the sole discretion of SCLS.

### **3.4 INSURANCE REQUIREMENTS**

All Vendors shall complete and sign the attached Certificate of Insurance with their technical proposal per the attached insurance requirement form. The selector contractor shall provide complete and valid insurance certificates within ten (10) days at the request of SCLS. Failure to provide the documents within the time stated may result in rejection of the contractor's proposal. Alterations to the terms and conditions shall not be allowed.

### **3.5 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION**

By signing and submitting this proposal, Vendor certifies that neither the vendor nor the company's principals are presently debarred, suspended, proposed from debarment, declared ineligible, or voluntarily excluded from participation, by any Federal department or agency, from transactions involving the use of Federal funds. Where Vendor is unable to

certify to any of the Statements in this certification, Vendor shall attach an explanation to their offer.

### **3.6 STATEMENT OF CONFIDENTIALITY**

It is understood and agreed that all information pertinent to this solicitation may contain trade secrets, which are confidential and proprietary. Proposal submissions are subject to the *South Carolina Public Information Act*. In accordance with the Act, certain information is subject to public disclosure. Please be advised that should Vendor deem any portion of your proposal as confidential or proprietary, it must be conspicuously indicated on those portions so deemed. However, and in accordance with the Act, you are hereby notified that every portion may still be subject to disclosure under the Act.

### **3.7 NOTIFICATION OF SUCCESSFUL VENDOR(S)**

The successful Vendor(s) will be advised of selection by SCLS through the issuance of a notification of award letter via email. Any notification of the selection of the successful Vendor(s) shall have no legal effect unless and until the parties negotiate a mutually acceptable contract.

### **3.8 PROPOSED TERMS OF CONTRACT**

SCLS is requesting that the selected Vendor enter into a three (3) year contract with the option to extend the contract on an annual basis, if determined to be in the best interest of SCLS. The contract shall begin on a mutually agreed upon date between SCLS and the successful Vendor, which should be after the application gets approved by SCLS' board of directors and the Legal Services Corporation and can be extended on an annual basis for a maximum of two (2) years at the sole discretion of SCLS.

### **3.9 SECURITY AND CLEARANCES**

All personnel (Vendors and subcontractors) that will be working on this project at SCLS sites must observe all security and safety procedures of the facility and must secure all record checks required by law.

### **3.10 ADDITIONAL INFORMATION FOR THE PROVIDERS**

SCLS reserves the right to:

- Amend, modify, cancel this RFP or not award any contract;
- Modify or add to the requirements contained in this RFP at any time after the issuance of this RFP for compliance by all providers;
- Utilize any and all ideas submitted in the RFP proposals received;
- Request providers to clarify their RFP proposals;

- Purchase the most cost-effective proposal and not necessarily the lowest-priced proposal;

### 3.11 QUESTIONS AND INQUIRIES

No interpretation of the meaning of the specifications or other documents will be made to any proposer orally.

### 3.12 CONTRACT TYPE

The contract resulting from this solicitation will be a **fixed-price contract**.

### 3.13 PAYMENT TERMS

The Vendor shall submit an invoice detailing the services provided and the actual costs incurred. Payment shall be in accordance with line item pricing on the Purchase Order and made within thirty (30) days after the date of the invoice.

SCLS reserves the right to reduce or withhold contract payment in the event that Vendor does not provide SCLS with all required deliverables within the time frame specified in the contract or in the event that the Vendor otherwise materially breaches the terms and conditions of the contract.

### 3.14 RFP REVISIONS

Should it become necessary to revise any part of this RFP, addenda will be posted on <http://www.scllegal.org/technology-services/Vendor>. All addenda, amendments or changes issued shall be deemed received by Vendor, provided they are posted to SCLS' website. Failure of any Vendor to receive or acknowledge receipt of such addenda or interpretation shall not relieve any Vendor from any obligations under this RFP as amended by all addenda. All addenda so issued shall become part of the award.

### 3.15 SUBMISSION DEADLINE

In order to be eligible for consideration, proposals must be received via email no later than **4:30 PM EST on Wednesday, March 8, 2017**. Vendors emailing proposals shall verify receipt to ensure timely receipt of their proposal prior to the deadline. Any proposal received by SCLS after the submission deadline, no matter what the reason, will not be considered.

### 3.16 DURATION OFFER

A proposal submitted in response to this solicitation is binding upon the Vendor and is considered irrevocable for a minimum of 120 days following the closing date for receipt of initial proposals or the closing date for receipt of a best and final offer, if applicable.

### **3.17 TERMS AND CONDITIONS**

Any contract entered into in connection with this solicitation shall be subject to these General terms and Conditions except as otherwise modified herein. It shall be the Vendor's sole responsibility to insure they are compliant with all applicable federal, state and city laws, rules, ordinances, statutes, etc., that may impact this contract. SCLS shall bear no responsibility for monitoring the Vendor's compliance with said legal requirements. If the Vendor fails to maintain legal compliance, SCLS may find said Vendor in default.

## 4. RFP PROCESS AND SCHEDULE

This Section summarizes the process and schedule associated with this RFP.

February 6, 2017	RFP Published on SCLS' website
February 21, 2017	Deadline for submitting Respondent questions by 3:00 p.m.
February 24, 2017	Responses to all submitted questions due by 3:00 pm
March 8, 2017	Deadline for receipt of proposals
March 20, 2017	Selection of potentially acceptable candidates
March 22-24, 017	If applicable, schedule interviews
March 27-31, 2017	If applicable, negotiated final offer due
April 1, 2017	Notification of RFP award and Approval and announcement of Vendor selection(s)

## 5. PROPOSAL FORMAT

### 5.1 GENERAL

The proposals shall be used to determine the Vendor's capability of rendering the services to be provided. Failure to fully comply with the instructions in this RFP may eliminate the Vendor's proposal from further evaluation as determined at the sole discretion of SCLS. SCLS reserves the right to evaluate the contents of proposals submitted in response to this RFP and to select a successful Vendor, or none at all.

SCLS reserves the right to waive any requirements of this RFP when it determines that waiving a requirement is in the best interest of SCLS. The proposal is to include contact information, including principle contacts and officers, main and local business addresses, tax identification number, voice and fax phone numbers and email addresses. Vendor must sign proposals. An unsigned proposal may be rejected.

### 5.2 PROPOSAL FORMAT

All proposals should be typewritten on "8 ½ x 11" paper – 12 pt. minimum type; have consecutively numbered pages; including any exhibits, charts, or other attachments.

Proposals shall be organized into the following major sections:

#### 5.2.1 COVER LETTER

The cover letter shall contain the following information:

- Title of this RFP
- Name and Mailing Address of Company (include physical location if mailing address is PO Box)
- Name of Contact Person, telephone phone number, fax number and email address
- A statement that the submitting contractor will perform the services and adhere to the requirements described in this RFP, including any addenda (*reference the addenda by date and/or number*)
- Summarize Vendor's history and other completed projects most relevant to this Share Point Online 2016 RFP.

#### 5.2.2 EXECUTIVE SUMMARY

The Executive Summary shall provide an overview of the project and indicate the project's complexity and the Vendor's ability to resolve inherent project problems. This section should also include a brief narrative highlighting your company's background, experience

and qualifications for performing the requested services. Narrative should clearly demonstrate Vendor's ability to provide the services required in this RFP.

### **5.2.3 COMPANY BACKGROUND AND HISTORY**

- Describe experience of firm in general providing consulting/professional services.
- Describe relevant services carried out in the last five (3) years which illustrate company's experience as it relates to this RFP.

### **5.2.4 EVIDENCE OF RESPONSIBILITY**

Vendors shall submit, with their Bids, all necessary evidence showing their financial resources; experience in the type of work being required by SCLS; organization available for the performance of the work, and any other required evidence of qualifications to perform. SCLS shall consider such evidence before making its award decision. Failure to submit adequate evidence of Contractor's responsibility to perform may result in rejection of the Bid.

### **5.2.5 PROJECT APPROACH / MANAGEMENT**

Please include the following information in the section:

- Provide a brief description of how the Vendor proposes to successfully manage this project and meet the goals and objectives of this RFP. Describe your Initial Work Plan and schedule, including a detailed timeline and milestones.
- Include a brief summary of how the project team will be structured, a description of the role, qualifications and experience of each team member and designated project manager/lead assigned to this project, including location within the company's organizational framework and length of service.

### **5.2.6 PROJECT UNDERSTANDING**

Based on the available information, supplemental research, field observations, and experience with similar projects, provide a narrative describing your understanding of the services requested in this RFP, your general strategies and any major challenges to achieving SCLS' stated goals.

### 5.2.6.1 PROJECT PLAN

- Develop a project plan with dates and milestones to be used throughout the project.
- Provide a detailed discussion of your company's approach to the successful implementation of this project. Include thorough discussions of methodologies you believe are essential to accomplishing this project. Include a proposed work schedule to accomplish all of the required tasks within the desired timeline.
- Identify team members who would be assigned to each task.

### 5.2.6.2 COST PROPOSAL

- SCLS is seeking a **fixed price proposal** to deliver the services described in this RFP. Clearly define all costs associated with the services defined in your proposal. Provide a total cost proposal for all products and services, detailed pricing for the proposed solution; include separate costs for software components, support costs and professional services, if applicable.
- The cost proposal must set forth all costs associated with the proposed scope of work for the RFP. The Vendor must acknowledge that all costs, including travel required to meet the RFP requirements are included. Any purchase contract signed will be a fixed price contract and no other costs will be allowed for performance of Vendor's proposed solution. A proposal for the price of purchase should be submitted with a purchase contract, if required.
- Contactor shall describe methodology for resolving billing issues. The Contractor will be responsible for identifying and correcting all errors in a reasonable timeframe. For billing errors identified by SCLS, vendor will provide adjustment of charges within two billing cycles of notification.
- Contractor must provide policy regarding the issuing of credits.

### 5.2.7 REFERENCES

Include five (5) references for customers of similar scope and size in South Carolina. This reference list shall include the following information:

Organization Name

Customer Contact – name, title and contact information

Address

Date of work performed

Brief description of work performed

## **6. EVALUATION CRITERIA AND SELECTION PROCEDURE**

### **6.1 EVALUATION COMMITTEE**

Evaluation of the proposals will be performed by a committee established for that purpose and will be based on the criteria set forth below. The contract resulting from this RFP will be awarded to the Vendor whose proposal is the most advantageous to SCLS, considering price and technical factors set forth herein. SCLS' evaluation committee will make the final determination about acceptability of proposals.

### **6.2 EVALUATION PROCESS**

- a. The committee will review submitted proposals to determine if Vendor's proposal adheres to the format and instructions of the RFP, conform to the goals, objectives and requirements of the RFP.
- b. As part of this evaluation, the Committee may hold discussions with all qualified Vendors. Discussions may be conducted via teleconference or may take the form of questions to be answered by the Vendors and conducted by e-mail, at the discretion of SCLS. During the evaluation process, the evaluation committee may request technical assistance from any source.
- c. Following the completion of the evaluation of all Vendors' proposals, including any discussions, the committee will rank each qualified Vendor's proposal.
- d. The Evaluation Committee may reject in whole or in part any and all proposals, waive minor irregularities, and conduct discussions with all responsible Vendors in any manner deemed necessary to serve the best interests of SCLS.
- e. Vendors may be asked to make an oral presentation to the Evaluation Committee. The purpose of the oral presentation is to provide an opportunity for the Vendor to clarify its proposal submission and substantiate proposal representation. The oral presentation is a part of the technical evaluation. If it is determined to be in the best interest of SCLS, SCLS may invite Vendors to make final revisions to their technical and/or financial proposals through submission of a Best and Final Offer.
- f. The Committee will recommend the Vendor whose overall proposal provides the most advantageous offer to SCLS considering both price and technical factors set forth in this RFP.

### 6.3 EVALUATION CRITERIA

The Evaluation committee will evaluate the RFP proposals using the criteria below. The committee shall determine which proposals have the basic requirements of the RFP and shall have the authority to determine whether any deviation from the requirements of the RFP is substantial in nature. The committee may reject in whole or in part any and all proposals and waive minor irregularities.

Total maximum score is 100 points.

Evaluation Criteria	Maximum Points Possible
<ul style="list-style-type: none"> <li>• Reasonable/cost effectiveness of service; including detailed breakdown of cost</li> </ul>	<ul style="list-style-type: none"> <li>• 20</li> </ul>
<ul style="list-style-type: none"> <li>• Vendor proposal meets minimum specifications of RFP</li> <li>• Comprehensive implementation plan designed to minimize disruption of business activities and to ensure business continuity</li> </ul>	<ul style="list-style-type: none"> <li>• 20</li> </ul>
<ul style="list-style-type: none"> <li>• Qualifications and experience: past experience and performance on comparable projects, references, experience and capabilities of Vendor;</li> <li>• Proposer’s project personnel: level of technical qualifications and experience</li> </ul>	<ul style="list-style-type: none"> <li>• 20</li> </ul>
<ul style="list-style-type: none"> <li>• Proposer’s demonstration of an understanding of the project’s requirements as outlined in RFP</li> </ul>	<ul style="list-style-type: none"> <li>• 20</li> </ul>
<ul style="list-style-type: none"> <li>• Degree to which proposed methodology and supporting documentation for managing project performance meets SCLS’ needs.</li> </ul>	<ul style="list-style-type: none"> <li>• 20</li> </ul>

## APPENDIX A. SPECIAL TERMS AND CONDITIONS

These Terms and Conditions shall apply unless otherwise noted in General Terms and Conditions attached to individual bid request. It shall be the Vendor's sole responsibility to insure they are compliant with all applicable federal, state, and city laws, rules, ordinances, statutes, etc., that may impact this contract. SCLS shall bear no responsibility for monitoring the Vendor's compliance with said legal requirements. If the Vendor fails to maintain legal compliance, SCLS may find said Vendor in default.

### 1. REQUEST FOR PROPOSALS (RFP)

a) DIRECTIONS: SCLS invites all interested and qualified Vendors to submit proposals to this RFP in accordance with directions specified in the attached General Terms and Conditions and these Special Terms and Conditions.

b) DEFINITIONS: For the purpose and clarity of this document only, "SCLS" will mean South Carolina Legal Services. Also, for the purpose and clarity of this document, "Vendor" will mean any reliable and interested Vendor, and/or contractor that responds to this RFP.

### 2. GENERAL REQUIREMENTS

a) TYPES OF PURCHASES: These specifications are intended to cover the various types of purchases of equipment, materials, supplies, or services to SCLS.

b) MINIMUM REQUIREMENTS: Whenever mention is made of any article, material, or workmanship to be in accordance with laws, ordinances, building codes, underwriter's code, or similar expressions, the requirements of these laws, ordinances, etc., shall be construed as to the minimum requirements of these specifications.

c) COMPLIANCE WITH SPECIFICATIONS: The Vendor shall abide by and comply with the true intent of the specifications and not take advantage of any unintentional error or omission, but shall fully complete every part as the true intent and meaning of the drawings and specifications. Where the requirements of the laws, ordinances, etc., are mandatory, they shall govern. The successful Vendor, after award may be required to submit working drawings or detailed descriptive data identified as acceptable to SCLS, which would provide sufficient data to enable SCLS to judge the Vendor's compliance with the specifications.

d) **DEVIATIONS TO SPECIFICATIONS:** Any deviation from the specifications must be noted in detail by the Vendor, in writing, as an attachment to the response. The absence of a written list of specification deviations attached to the response will hold the Vendor strictly accountable to SCLS to the specification as written. Any deviation by the awarded Vendor from the specifications, without prior documented approval, will be grounds for rejection of the services.

e) **SUBCONTRACTORS:** The Awarded Vendor shall give its constant personal attention to the faithful execution of this contract, shall keep the same under its own control, and shall not assign by power of attorney or otherwise, the work or any part thereof without the previous written consent of SCLS. The Awarded Vendor shall provide the name of the subcontractor(s) it intends employing, the portion of the materials/labor to be furnished, their place of business, and such other information as requested by the specifications. The information may be used in considering the potential performance capabilities of the subcontractor(s). The Awarded Vendor shall not, without prior written consent of SCLS, assign any of the monies payable under the contract to any sub-contractor.

### 3. PRICES

a) **UNIT PRICES:** Unit Prices must be rounded off to no more than two (2) decimal places, unless so specified in the General Terms and Conditions included with the RFP. All unit prices on items shall be completed on the proposal sheet(s). A NO BID notation must be completed for each item not being bid. In case of error in extension of prices in the proposal response, the unit price shall govern.

b) **PRICE REDUCTIONS:** SCLS reserves the right to accept price reductions from the Awarded Vendor during the term of this contract to occur no less than thirty (30) days from the approval of the contract.

c) **TAXES:** Taxes shall be included in the bid, including taxes enacted before the bid date but taking affect after bidding. Taxes enacted after the bid date shall be paid by the Vendor and reimbursed by SCLS without any markup.

### 4. PROPOSAL SUBMISSION

a) **KNOWLEDGE OF TERMS AND CONDITIONS:** Vendors or their authorized representatives are expected to fully inform themselves as to the conditions, requirements, and specifications before submitting a proposal response. Failure to do so will be at the Vendor's own risk and Vendor cannot secure relief on the plea of

error. Neither law nor regulations make allowance for errors of omission or commission on the part of Vendors.

b) **SUBMISSION:** Proposals must be delivered to SCLS: Vendors must submit technical and cost proposals as specified in the **General Terms and Conditions**. Proposals must be signed and submitted by an authorized representative of the company. Each Vendor may attach a letter of explanation to the proposal, if so desired (or required), to provide an explanation of any detail(s) in the proposal. This letter may not be used to offer optional or alternative proposals or pricing.

c) **FORMAT:** Signed proposals must be delivered as specified in Section: 5. SCLS will not accept any facsimile transmission to agents, representatives or employees as meeting the requirement of the Proposal. A facsimile document shall not be considered a valid response to the RFP.

d) **VENDOR ADDRESS:** Each proposal must show the full business address, telephone number, and fax number of the Vendor and be signed by the person or persons legally authorized to sign contracts. All correspondence concerning the proposal and contract, including Notice of Award, copy of Contract, and Purchase Order, will be emailed or delivered to the address shown on the proposal in the absence of written instructions from the Vendor to the contrary.

e) **CORPORATIONS:** Proposals by corporations must be signed with the name of the corporation, followed by the signature and designation of the officer having authority to sign. When requested, satisfactory evidence of authority of the officer signing on behalf of the corporation shall be furnished. Anyone signing the proposal as agent shall file satisfactory evidence of authorization to do so.

f) **CERTIFICATES AND AFFIDAVITS:** All Vendors shall be required to complete the certificates and/or affidavits that are incorporated into the General Terms and Conditions of this RFP. Such documents are required by local, state, or federal funding agencies of SCLS as part of the bidding process.

g) **PROPOSAL PREPARATION FEES:** SCLS will not be responsible for any costs incurred by a Vendor in preparing and submitting a proposal response.

h) **PROPOSAL EVALUATION:** Proposal responses will be evaluated for compliance with detailed specifications. The specifications shall vary with each individual RFP issued, and the award shall be made in accordance with the General Terms and Conditions.

- i) RECOMMENDATION OF AWARD: Recommendation of an award of a contract will be made to SCLS in accordance with the General Terms and Conditions.
- j) CONTRACT TERMS: The Vendor shall refer to the General Terms and Conditions attached to the RFP for details regarding the Term of Contract for this solicitation.
- k) COMMENCEMENT OF SERVICES: SCLS shall have no obligation to pay for services performed before the contract is signed or after it ends. SCLS shall have no obligation to pay for services in excess of the monetary amount of the award. SCLS shall have no obligation to pay for services before a purchase order/invoice is issued.

## 5. ADDENDA

- a) INQUIRIES: No interpretation of the meaning of the specifications or other documents will be made to any Vendors orally. Unless otherwise specified in the General Terms and Conditions, inquiries are to be sent via email to: [patmuller@sclegal.org](mailto:patmuller@sclegal.org).  
"INQUIRY" and the RFP name and number must be noted in the subject line.
- b) ISSUANCE: Any change to the RFP specifications will be made through the appropriate addenda. Failure of any Vendor to receive such addenda or interpretation shall not relieve any Vendor from any obligation(s) under this RFP as amended by all addenda. All addenda so issued shall become a part of the award.

## 6. ANNULMENTS AND RESERVATIONS

- a) RIGHT TO REJECT: SCLS reserves the right to exercise its statutory option to reject any or all proposals and re-advertise for other proposals.
- b) CONTRACT RESERVATIONS: SCLS reserves the right to annul any contract if, in its opinion, there shall be a failure, at any time, to perform faithfully any of its stipulations, or in case of any willful attempt to impose upon SCLS materials, products and/or workmanship inferior to that required by the Vendor, and any action taken in pursuance of this latter stipulation shall not affect or impair any rights or claims of SCLS to damages for the breach of any covenant of the contract by the Vendor(s).

- c) Should the Vendor(s) fail to comply with the conditions of this contract or fail to complete the required work within the time stipulated in the contract, except for circumstances beyond its control, including, but not limited to, Acts of God, war, flood, or governmental restrictions, SCLS reserves the right to purchase the required articles in the open market or to complete the required work at the expense of the Vendor(s). Should the Vendor be prevented from furnishing any item or items, or from completing the required work included in the contract, by reason of such failures caused by circumstances beyond its control, including, but not limited to, Acts of God, war, flood, governmental action, SCLS reserves the right to withdraw such items or required work from the operation of this contract without incurring further liabilities.

## 7. TERMINATION OF CONTRACT

- a) **TERMINATION:** The contract may be terminated by either party at any time upon sixty (60) days written notice from the terminating party, if applicable.
- b) **TERMINATION FOR NON-APPROPRIATION OF FUNDS:** SCLS may terminate any resulting contract, in whole or in part, due to insufficient funding or non-appropriation of funds with written notice to the Vendor. SCLS, shall pay for all of the purchases, if any, incurred up to the date of the contract termination notice.
- c) **TERMINATION FOR DEFAULT:** When the Vendor has not performed or has unsatisfactorily performed the contract, payment shall be withheld at the discretion of SCLS. Failure on the part of a Vendor to fulfill contractual obligations shall be considered just cause for termination of the contract, and the Vendor is not entitled to any costs incurred up to the date of termination. In the event of a default by the Vendor, this Contract may be terminated.
- d) **CANCELLATION OF CONTRACT:** Cancellation of the contract by either party shall in no way relieve the bidder from its responsibility to complete any and all work in progress at the time of the notice and for which payment has been received by the bidder.

## 8. CONTRACT TERMS AND CONDITIONS

- a) **SUBMISSION OF INVOICES:** Vendor agrees to accept the line item price on the purchase order/invoice as final payment. All invoices are to be submitted promptly showing: Purchase Order/Invoice number and name and address of recipient and mailed to SCLS' Accounting Department, 701 South Main Street, Greenville, SC 29601 (unless otherwise noted).

b) **INCORRECT INVOICES:** Incorrect invoices will be returned for correction or paid in accordance with the purchase order. Each invoice shall identify SCLS Purchase Order Number, line item number and item description(s) or services shall be listed in the same order as on the Proposal and/or Purchase Order.

c) **PARTIAL PAYMENTS:** Payment in full will only be made upon final acceptance of items as shown on the Purchase Order. Partial payments are permissible.

d) **LATE SUBMISSION OF INVOICES:** The parties acknowledge and agree that the Vendor's invoices are to be submitted in a timely manner, per the terms of the purchase order, after the services have been provided. If invoices are submitted after one calendar year after the Vendor's services have been rendered, then SCLS shall have no obligation to pay for the stale invoice(s).

e) **CONFIDENTIALITY:** Vendor acknowledges and agrees to hold all Confidential Information in the strictest confidence as a fiduciary and will not make any press release or public announcement, or voluntarily sell, transfer, publish, disclose, display or otherwise make available to any third persons such Confidential Information or any portion thereof without the express written consent of SCLS.

f) **INDEMNIFICATION:** Vendor shall indemnify, defend, and hold harmless SCLS and its employees from any and all claims, demands, suits, and actions, including attorney's fees, litigation expenses and court costs, connected therewith, brought against SCLS and their respective appointed officials and employees, arising as a result of any direct or indirect, willful, or negligent act or omission of the consultant or its employees, agents or volunteers.

g) **INSURANCE:** Unless otherwise specified in the General Terms and Conditions, Vendor shall provide proof of commercial liability insurance and coverage amounts. Such insurance shall include contractual liability insurance. If applicable, Consultant shall, at all times, maintain and keep in force Professional Liability, Errors and Omissions Insurance at a defined limited and provide proof of such insurance, in the event the service delivered pursuant to this RFP, either directly or indirectly, involves or requires professional services. "Professional Services" for the purpose of this RFP shall mean any services provided by a licensed professional.

h) **NON-ASSIGNABILITY:** This contract shall not be assigned or services sub-contracted in whole or in part without the written consent of SCLS. Any attempt to do so without such consent shall be null and void of no effect.

i) **INDEPENDENT VENDOR:** Vendor is furnishing its goods and/or services hereunder as an independent Vendor, and nothing herein shall create any association, partnership or joint venture between the parties hereto or any employer-employee relationship.

j) **GENERAL RECORDS CLAUSE:** Vendor's contracts, files, accounts, records, and other documents related to this Contract shall be open to examination and/or audit by SCLS and made available by the Vendor to SCLS and/or its designated agent(s) at any time upon reasonable prior notice, during performance under this Contract and for a period of four (4) years after final payment or such longer period of time as required by law or rule or regulation(s).

k) **PROTECTION OF PROPERTY:** Vendor will use reasonable care to avoid damaging existing building, equipment, and property at SCLS offices and all material furnished by SCLS ("Property"). If the Vendor's failure to use reasonable care causes damage to any property, Vendor must replace or repair the damage at no expense to SCLS as directed by the Contracting Officer. If the Vendor fails or refuses to make such repair or replacement, the Vendor will be liable for the cost, which may be deducted from payments due Vendor.

l) **PUBLIC STATEMENTS:** Vendor shall not use or reference the Name or Logo of SCLS in issuing any press releases or otherwise making any public statement with respect to this Contract (unless such press release or statement is required by applicable law and/or regulations), without the prior written consent of SCLS, which consent will not be unreasonably withheld. Purchase by SCLS of any service does not imply that SCLS has either adopted or endorsed the product of service, and the use by any manufacturer, Vendor, merchant or other person of the name or logo of SCLS in any advertisement that they are furnishing products or services is not authorized.

## APPENDIX B. DESCRIPTION OF COMPANY AND COMPANY'S QUALIFICATIONS

1. Legal Business Name:

\_\_\_\_\_

2. Business Office Address:

\_\_\_\_\_

City, State, Zip:

Telephone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

URL: \_\_\_\_\_

3. Business Effective Date: \_\_\_\_\_

4. Organized Business Status:

\_\_\_\_\_ Corporation

\_\_\_\_\_ Partnership

\_\_\_\_\_ Individual/Sole Proprietor

\_\_\_\_\_ Other

5. How many years have you been engaged in the business under your present name?

\_\_\_\_\_

6. What other name(s) if any, has your business/company operated under and taxpayer number used:

7. Number of similar and successfully completed projects: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8. Number of similar projects currently underway: \_\_\_\_\_

9. Please list the names of your personnel authorized to sign legal and binding Bid Documents:

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\*Any information that will facilitate SCLS' evaluation of your company's substantive reliability, financial and managerial capacity to provide the services.

**Authorized Company Representative**

**SIGNATURE** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**NAME:** \_\_\_\_\_

**TITLE:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

**TELEPHONE NUMBER:** \_\_\_\_\_

**FAX NUMBER:** \_\_\_\_\_

\_\_\_\_\_  
**Notary Public for South Carolina**

**My Commission Expires:** \_\_\_\_\_

## APPENDIX C. REFERENCES

1. CLIENT NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
SERVICES PROVIDED: \_\_\_\_\_  
DATE(S) OF SERVICES: \_\_\_\_\_  
CONTACT NAME & TITLE: \_\_\_\_\_  
PHONE NUMBER: \_\_\_\_\_  
EMAIL ADDRESS: \_\_\_\_\_

2. CLIENT NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
SERVICES PROVIDED: \_\_\_\_\_  
DATE(S) OF SERVICES: \_\_\_\_\_  
CONTACT NAME & TITLE: \_\_\_\_\_  
PHONE NUMBER: \_\_\_\_\_  
EMAIL ADDRESS: \_\_\_\_\_

3. CLIENT NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
SERVICES PROVIDED: \_\_\_\_\_  
DATE(S) OF SERVICES: \_\_\_\_\_  
CONTACT NAME & TITLE: \_\_\_\_\_  
PHONE NUMBER: \_\_\_\_\_  
EMAIL ADDRESS: \_\_\_\_\_

## APPENDIX D. CERTIFICATE OF INSURANCE COVERAGE

VENDOR NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME OF SURETY: (TYPE OR PRINT) \_\_\_\_\_

NAME OF AGENT: (TYPE OR PRINT) \_\_\_\_\_

AGENT'S PHONE NUMBER: \_\_\_\_\_

The below signed hereby certifies that the following information is true and correct.

Type of Insurance	Minimum Required Limits	Policy or Binder Number	Actual Limits Provided	Expiration Date

The following additional clauses will be considered a part of the above policy(s), the same as if specifically written therein, as pertains to the above stated contract.

The successful Vendor will be required to provide proof of insurance coverage as shown in the General Conditions of the RFP and Contract, prior to beginning any work. This insurance coverage must be maintained throughout the life of the contract. **PROOF THAT COVERAGE IS EITHER CURRENTLY IN PLACE OR WILL BE PROVIDED MUST BE SUBMITTED WITH THE BID.** This can be done by one of the two following methods:

Complete form "CERTIFICATION OF INSURANCE COVERAGE" **or**

Submit a Certificate of Insurance on a form provided by your Insurance Agent. Failure to provide the required insurance coverage by either of the two (2) methods described above when the RFP is submitted, may result in rejection of your RFP.

\_\_\_\_\_  
(Authorized Agent's Signature)

\_\_\_\_\_  
(Date)

**APPENDIX E. COST PROPOSAL FORM**  
(TO BE SUBMITTED WITH SERVICE PROPOSAL)

COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_

TO: SOUTH CAROLINA LEGAL SERVICES

The undersigned, doing business under the full and complete legal firm name as set forth below, propose to provide telecommunication voice and data communication services to South Carolina Legal Services in accordance with Special Terms and Conditions, General Terms and Conditions, Scope of Work, and other documents of this Request for Proposal.

## APPENDIX F. QUOTATION PAGE/BID FORM – PRICING

Printed Name: \_\_\_\_\_

Signature \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_