

1. The Deliverables

- 1.1. The HISS Consortium holds a Campus and School Agreement (CASA) with Microsoft. Each Member institution is under its own Enrollment for Education Solutions (EES) for Microsoft for Education Desktop Client Access Licenses (CAL's) with a contract term of September 1, 2018 to August 31, 2021. In this RFP HISS is seeking a Microsoft accredited Licensing Solution Provider (LSP) to take-on the provisioning of CAL licenses for year 3 of the current agreement and support the renewal of the contract with Microsoft beyond August 2021 for a subsequent term of a duration to be negotiated.
- 1.2. In addition to the fulfillment of the 9 coterminous Enrollment for Education Solutions (EES) agreements connected through the CASA, the supplier will also provide other Microsoft software products, including any other Microsoft volume licensing programs and ad-hoc Microsoft software purchased by participating Members.

2. Description of Services

- 2.1. Deliverables to be provided include (but are not limited to) the following:

2.1.1. Administration Support

- 2.1.1.1. Easy access to a responsive account representative (or a team of personnel led by a representative) assigned to each Member to support its needs;
- 2.1.1.2. Issuing invoices to various members under the Microsoft Enrollment for Education Solution Agreement and reconciling payment;
- 2.1.1.3. Fulfill other licensing solution provider responsibilities as required by Microsoft;
- 2.1.1.4. Provide Members with account setup and ensure seamless transition;
- 2.1.1.5. Establishing an ongoing communications program with HISS and its Members;
- 2.1.1.6. Attending quarterly business reviews with HISS and its Members or other meetings, as requested; and
- 2.1.1.7. Providing reports to HISS and its Members, as required.
- 2.1.1.8. The Supplier's team is expected to be responsive to the needs of the Members (i.e. next Business Day response), provide requested information and documentation in a timely manner and issue resolution.

2.1.2. Technical Support

- 2.1.2.1. The Supplier will provide the following technical support Services to Members and/or, where applicable, act as a liaison between Microsoft and the Member in ensuring quality and on-time technical support Services are received by the Members upon request:
 - 2.1.2.1.1. Easy access for day-to-day technical support (i.e. by toll free telephone number, email, voicemail, and fax);

- 2.1.2.1.2.** Notify HISS and the Members of software upgrades available in a timely fashion;
- 2.1.2.1.3.** Support Member technology teams in resolving software failures;
- 2.1.2.1.4.** Ensure minimal disruption to the Member and provide support in a timely manner;
- 2.1.2.1.5.** Establish and track software quality metrics, upon request; and
- 2.1.2.1.6.** Guide Member technology team members on monitoring, maintenance and best practices on software.

2.1.3. Web Portal

2.1.3.1. The Supplier will optionally provide a customized and login-secured web portal. They will support HISS and HISS Member access to Microsoft Volume Licensing Service Centre (“VLSC”) to obtain information such as, but not limited to: purchased, active usage, serial numbers, physical locations, expirations or renewal details, and other agreement information such as pricing. This web portal should be customized with a number of hierarchies to allow for parent and various child-level accessed data. The tool should also have flexible reporting capabilities.

2.1.3.2. Web portal access will also allow a Member to download software Products and keys.

2.1.4. Other Services

2.1.4.1. During the Term of the Agreement, a Member may request other Software License related Services including but not limited to the following:

- 2.1.4.1.1.** Customizing or configure software Product;
- 2.1.4.1.2.** Additional training; and
- 2.1.4.1.3.** Assessment Services.

2.1.4.2. During the Term, new or changes in the Microsoft software Products, services and/or features may be available. The Supplier shall keep Members and HISS informed and make these Services and/or features available to Members.

2.2. Invoicing

2.2.1. The Supplier will submit invoices after Services have been provided. The invoices will be in either paper or electronic format, as detailed in the Member’s Enrollment for Education Solutions Agreement. The invoice should be itemized and contain, at a minimum, the following information:

- 2.2.1.1.** Invoice number;
- 2.2.1.2.** Member’s organization;
- 2.2.1.3.** Member’s contact person who placed orders;
- 2.2.1.4.** Member’s purchase order number;

- 2.2.1.5. Itemized Service type;
- 2.2.1.6. Service description;
- 2.2.1.7. Period of Services provided; Unit Rate per Service charged; and
- 2.2.1.8. Extended total (Unit price x Quantity, excluding taxes).

2.3. Payment Terms

- 2.3.1. The Member's standard payment terms are typically net thirty (30) days. Due to the Member's varying payment policies, different payment terms (e.g. prepay) or length of payment terms (e.g. net forty-five (45) days), may be agreed upon, at the Member's request.
- 2.3.2. Note – Member's payment terms will not be in effect until the Supplier provides an accurate invoice.

2.4. Pricing Refresh and Agreement Extension

- 2.4.1. Rates will remain fixed for the initial Term of the Agreement to August 2021.
- 2.4.2. Supplier performance (e.g. Member satisfaction, ethical business practices, marketing efforts and any commitments made during in the Proponent's Proposal) received under the Agreement will be considered when contemplating a pricing refresh and Agreement option period extension.

3. Material Disclosures

3.1. Member institutions:

- 3.1.1. The following is a list of the HISS member institutions. Member institutions may be added or deleted as requirements may change throughout the contract period
 - 3.1.1.1. Acadia University, Wolfville, NS
 - 3.1.1.2. Atlantic School of Theology, Halifax, NS
 - 3.1.1.3. Cape Breton University, Sydney, NS
 - 3.1.1.4. Dalhousie University, Halifax, NS
 - 3.1.1.5. Mount Saint Vincent University, Halifax, NS
 - 3.1.1.6. NSCAD University, Halifax, NS
 - 3.1.1.7. Nova Scotia Community College, Various locations throughout NS
 - 3.1.1.8. Saint Mary's University, Halifax, NS
 - 3.1.1.9. St. Francis Xavier University, Antigonish, NS
 - 3.1.1.10. Université Sainte-Anne, Church Point and Halifax, NS
 - 3.1.1.11. University of Kings College, Halifax, NS
- 3.1.2. Proponents are required to identify if they (with permission from Microsoft) are prepared to extend the ensuing agreement to the remaining ISI member institutions and any eligible public-sector entity. Proponents should be prepared to address a cost reduction as a result of the additional volume that could be attained by any additional participants.

3.2. Quantities

3.2.1. The following annual quantities are minimum agreed M365 A3 knowledge worker volumes from the HISS Campus and School Agreement.

Institution	August 2020
Acadia University	606
Atlantic School of Theology	32
Cape Breton University	497
Dalhousie University (& University of King's College)	3,431
Mount Saint Vincent University	464
Nova Scotia Community College	1,872
Saint Mary's University	765
St. Francis Xavier University	726
Universite Sainte Anne	212

3.3. Volume Usage Reporting:

3.3.1. The Supplier will be responsible for providing volume reports to the HISS Coordinating Entity reflecting the individual transactions of the participating members. These reports should be sent to the Coordinating Entity semi-annually. April 1 through September 30 (inclusive) will be due October 15 and October 1st through March 30 (inclusive) will be due April 15. The information will be provided in an Excel format and shall be transmitted electronically. Failure to do so may result in cancellation of the agreement.

3.4. Key Performance Indicators (KPI):

3.4.1. N/A

4. Mandatory Submission Requirements

4.1. Submission Form (Appendix B)

4.1.1. Each proposal must include a Submission Form (Appendix B) completed and signed by an authorized representative of the proponent.

4.2. Pricing (Appendix C)

4.2.1. Each proposal must include pricing information that complies with the instructions contained in Pricing (Appendix C).

4.3. RFP Particulars (Appendix D)

4.3.1. Each proposal must include the proponents Appendix D response to the evaluated criteria.

4.3.2. N/A

4.4. Other Mandatory Submission Requirements

5. Mandatory Technical Requirements

5.1. Proponents must identify any binding agreements in place with any member for the provision of the deliverables that could impede that member from participating in any agreement that may result from this RFP. For agreements identified proponents must also detail the process for those members to cease that agreement to be eligible to participate in any agreement resulting from this RFP.

5.2. Proponent's Accreditation

5.2.1. The Proponent will be expected to be in current possession of and with current good standing as a Microsoft authorized Licensing Solutions Partner (LSP).

5.2.2. The Proponent must submit within its Proposal, an authorized Large Account Reseller ("LAR") letter issued by Microsoft confirming the Proponent's LSP accreditation and good standing. The letter should include the following elements:

5.2.2.1. The named Proponent is confirmed to be an authorized LAR of Microsoft software Products with LSP accreditation;

5.2.2.2. Letter must be current and dated within one (1) month of the Proponent's Proposal Submission Deadline; and

5.2.2.3. Letter to be signed by an authorized representative from Microsoft and issued on Microsoft letter head.

5.3. Pre-Conditions of Award

5.3.1. The proponent is to outline any modification or addition to the Terms and Conditions contained within Appendix A – Framework Agreement, alterations should be marked on the document.

5.3.2. Proponent will submit all legal documents which would require participating members' sign off for review. All other documents need to be binding to the Framework Agreement and any contradictory terms are not permitted.

6. Rated Criteria

- 6.1.** The following sets out the categories, weightings and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.
- 6.2.** Proponents may be short listed and invited to participate in an interview to support their ability to meet criteria as set out below.

Rated Criteria Category	Weighting (Points)	Minimum Threshold
Experience and Qualifications of Firm	30	16
Assigned Account Team	20	11
Reseller Methodology	40	21
Value Add	10	N/A
Pricing (See Appendix C for details)	100	N/A
Total Points	200	N/A

- 6.3.** Each proponent should provide the following responses in its proposal clearly noted and separated as follows:

6.4. Experience and Qualifications of Firm

- 6.4.1.** a brief description of the proponent and corporate profile;
- 6.4.2.** a description of its knowledge, skills and experience relevant to the Deliverables in higher education; including two Canadian Higher-Education references for MS LSP services. References should not exclusively be HISS members (include other higher education or relevant institutions).

6.5. Assigned Account Team

- 6.5.1.** The roles and responsibilities of the proponent and any of its agents, employees and sub-contractors who will be involved in providing the Deliverables (org chart), together with the name, relevant skills, and experience in higher education (or other relevant industries) (CV's) of those staff who will be performing those roles.

Should include at a minimum: inside sales, sales lead, EDU licensing support, architecture/technical support.

6.6. Reseller Methodology

6.6.1. proposed approach and methodology for the delivery of MS license solution provider services to HISS and its members in Nova Scotia as provided in para 2 above; specifically:

- 6.6.1.1.** Verification of actual licenses being purchased and procure-to-pay
- 6.6.1.2.** Renewal negotiation,
- 6.6.1.3.** Deployment and infrastructure optimization planning,
- 6.6.1.4.** Technical/Licensing Support escalation,
- 6.6.1.5.** Facilitating exploration and adoption of new Microsoft technologies (such as telephony, security, compliance) by the members,
- 6.6.1.6.** Meetings, presentations, and customer contact both remote and in-person.

6.7. Value Add

6.7.1. description of value-added services