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|  WINTHROP UNIVERSITY | Amendment 01 | Solicitation: Date Issued: Procurement Officer: Phone: E-Mail Address: Mailing Address: | R2100411-MC 09/15/2020 MICHAEL CUPP 8033232143 cuppm@winthrop.edu PROCUREMENT SERVICES 307 TILLMAN HALL Rock Hill SC 29733-0001 |
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DESCRIPTION: **Chatbot Text-based Student Retention Communications Software**

USING GOVERNMENTAL UNIT: **Winthrop University**

The Term "Offer" Means Your "Bid" or "Proposal". Your offer must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior. See "Submitting Your Paper Offer or Modification" provision.

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES

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| MAILING ADDRESS: WINTHROP UNIVERSITY PROCUREMENT SERVICES 307 TILLMAN HALL Rock Hill SC 29733-0001 | PHYSICAL ADDRESS: WINTHROP UNIVERSITY PROCUREMENT SERVICES 307 TILLMAN HALL Rock Hill SC 29733-0001 |
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SUBMIT OFFER BY (Opening Date/Time): **09/29/2020 3:00 PM** (See "Deadline For Submission Of Offer" provision)

~~QUESTIONS MUST BE RECEIVED BY: 09/22/2020 10:30 AM~~ (See "~~Questions From Offerors~~" provision)

NUMBER OF COPIES TO BE SUBMITTED: **ONE (1) ORIGINAL**

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| CONFERENCE TYPE: Not Applicable DATE & TIME: (As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions) | LOCATION: Not Applicable |
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| AWARD & AMENDMENTS | This solicitation, any amendments, and any related notices will be posted at the following web address: https://www.winthrop.edu/procurement/solicitations-and-statements-of-awards.aspx |
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You must submit a signed copy of this form with Your Offer. By signing, you agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the Opening Date. (See "Signing Your Offer" provision.)

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| NAME OF OFFEROR (full legal name of business submitting the offer) | Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc. |
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| AUTHORIZED SIGNATURE (Person must be authorized to submit binding offer to contract on behalf of Offeror.) | DATE SIGNED |
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| TITLE (business title of person signing above) | TAXPAYER IDENTIFICATION NUMBER (You may also register to obtain S.C. Vendor No. at www.procurement.sc.gov) |
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| PRINTED NAME (printed name of person signing above) | STATE OF INCORPORATION (If you are a corporation, identify the state of incorporation.) |
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| OFFEROR'S TYPE OF ENTITY: (Check one) (See "Signing Your Offer" provision.) <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Other _____ <input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) |
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PAGE TWO

(Return Page Two with Your Offer)

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| <p>HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)</p> | <p>NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)</p> <p align="right">Area Code - _____</p> <p align="right">Number - Extension Facsimile _____</p> <p align="right">E-mail _____</p> <p align="right">Address _____</p> |
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| <p>PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)</p> <p>____ Payment Address same as Home Office Address</p> <p>____ Payment Address same as Notice Address (check only one)</p> | <p>ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses)</p> <p>____ Order Address same as Home Office Address</p> <p>____ Order Address same as Notice Address (check only one)</p> |
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ACKNOWLEDGMENT OF AMENDMENTS
 Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)

| Amendment No. | Amendment Issue Date |
|---------------|----------------------|---------------|----------------------|---------------|----------------------|---------------|----------------------|
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| <p>DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)</p> | <p>10 Calendar Days (%)</p> | <p>20 Calendar Days (%)</p> | <p>30 Calendar Days (%)</p> | <p>____ Calendar Days (%)</p> |
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PREFERENCES - A NOTICE TO VENDORS (SEP. 2009): On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at www.procurement.sc.gov/preferences. ***ALL THE PREFERENCES MUST BE CLAIMED AND ARE APPLIED BY LINE ITEM, REGARDLESS OF WHETHER AWARD IS MADE BY ITEM OR LOT. VENDORS ARE CAUTIONED TO CAREFULLY REVIEW THE STATUTE BEFORE CLAIMING ANY PREFERENCES. THE REQUIREMENTS TO QUALIFY HAVE CHANGED. IF YOU REQUEST A PREFERENCE, YOU ARE CERTIFYING THAT YOUR OFFER QUALIFIES FOR THE PREFERENCE YOU'VE CLAIMED. IMPROPERLY REQUESTING A PREFERENCE CAN HAVE SERIOUS CONSEQUENCES.*** [11-35-1524(E)(4)&(6)]

PREFERENCES - ADDRESS AND PHONE OF IN-STATE OFFICE: Please provide the address and phone number for your in-state office in the space provided below. An in-state office is necessary to claim either the Resident Vendor Preference (11-35-1524(C)(1)(i)&(ii)) or the Resident Contractor Preference (11-35-1524(C)(1)(iii)). Accordingly, you must provide this information to qualify for the preference. An in-state office is not required, but can be beneficial, if you are claiming the Resident Subcontractor Preference (11-35-1524(D)).

____ In-State Office Address same as Home Office Address ____ In-State Office Address same as Notice Address **(check only one)**

AMENDMENT 01

AMENDMENTS TO SOLICITATION (JAN 2004): (a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offerors should monitor the following web site for the issuance of Amendments: www.procurement.sc.gov(b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

[02-2A005-1]

1. Question: Can you please provide additional insight on the following Scope of Work request:

"Provide a dashboard for individual risk analysis for students based on their responses to texts"

Any descriptions or examples you can provide would be greatly appreciated.

1. Answer: The dashboard should provide aggregate data on response patterns for different groups of students based on identified factors or student characteristics (e.g., cohort groups, first-generation status, TRiO, residence hall, etc.). We should be able to see patterns of concern and be able to disaggregate the data to understand if particular factors are more or less of a concern for certain groups of students.

2. Question: Which application(s)/platform(s) does Chatbot needs to be deployed to? Please share details does it needs to be deployed to:

- Intranet Site? If yes, which Intranet solution is it?
- MS Teams?
- Mobile App – If yes, which platform is it built on?
- Public Web site – If yes, what is the platform it is built on?

2. Answer: The application needs to use texting via mobile phone.

3. Question: Are there any other Integrations needed apart from Banner ERP? If yes, please share the details?

3. Answer: No.

4. Question: Do you have MS Azure Subscription in place? Is it Enterprise version or Government cloud?

4. Answer: No.

5. Question: How many custom Reports are we looking for as part of the Analytics needs?

5. Answer: Not known at this time. Will depend on emerging needs.

6. Question: Do you need SMS enabled Text conversation as well – Ability to chat with the bot using SMS?

6. Answer: Yes, this is the primary intended use of this technology.

7. Question: Is there any existing chatbot implemented in university? If yes, please share details.

7. Answer: No.

8. Question: How many Integrations are required from the Chatbot? Please specify details of the applications to which integrations are required?

8. Answer: None. Student information needs to be tied to CWID (Campus-Wide-ID).

9. Question: Which all languages need to be supported via the Chatbot?

9. Answer: English only.

10. Question: Will you be providing the list of Q&A to be added to the Chatbot?

10. Answer: No, base campaigns should be provided by the vendor and there should be opportunity to add/develop customized campaigns.

11. Question: Is all the work required to be done onsite or some of the services can be provided from an offsite/offshore location?

11. Answer: No part of the resulting contract from this solicitation may be performed offshore of the United States by persons located offshore of the United State or by means, methods, or communications that, in whole or in part, take place offshore of the United States.

12. Question: Are there any vendor selection criteria? If yes, please share the criteria along-with each weightage of each criteria?

12. Answer: Award will be made to the lowest responsible and responsive bidder(s).

13. Question: Is there any mandatory ask for SC certified Minority Business firm or subcontracting with SC certified Minority Business?

13. Answer: See pg. 20 MINORITY PARTICIPATION (DEC 2015)

14. Question: Does any preference will be given to the local vendors/Minority Business firm? If yes, then please share the weightage for the same.

14. Answer: www.procurement.sc.gov/preferences

15. Question: We assume that required maintenance and support window to be available only during the business hours (Monday – Friday). Please confirm.

15. Answer: Yes.

16. Question: We assume that there will not be any onsite/offsite full-time (during business hours) technical support resource requirement in maintenance period. Please confirm.

16. Answer: No.

17. Question: Does the project scope include training to the system users? If yes

- Can you please provide the details that how many users to be trained as part of the project? Can the training be proposed in train the trainer model?

17. Answer a: Two to five users. Yes, may use train the trainer.

- Do you need the vendors to provide training onsite or offsite training can be provided using tools such as WebEx, Teams, Skype, etc.?

17. Answer b: Offsite is acceptable.

18. Question: Looking at the requirement and proposal size and also considering the fact of COVID pandemic, our request for extension of due date of RFP by minimum 7-10 working days. Please consider.

18. Answer: No. Any offer received after the Procurement Officer of the governmental body or his designee has declared that the time set for opening has arrived, shall be rejected unless the offer has been delivered to the designated purchasing office or the governmental body's mail room which services that purchasing office prior to the opening.

END OF AMENDMENT 01