

**Contract #16-524
UNIVERSITY OF MARY WASHINGTON
Commonwealth of Virginia
Standard Contract**

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This contract entered into this 5th day of May 2017 (the effective date) by Swiss Post Solutions, Inc., North America, hereinafter called the "Contractor" and the Commonwealth of Virginia, University of Mary Washington called the "University" or "UMW".

WITNESSETH that the Contractor and the University, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF SERVICES: The Contractor shall provide the services described in the Statement of Work.

PERIOD OF CONTRACT: Billing for the Services will commence on July 3, 2017 (the "Commencement Date") through July 2, 2022; with an option to renew for two (2) additional five (5) year terms.

COMPENSATION AND METHOD OF PAYMENT: Will be in accordance with Section II Financial Structure, Invoicing, and Sections III, Special Terms and Conditions, Method of Payment.

CONTRACT DOCUMENTS: The contract documents shall consist of (in order of precedence):

- A. This signed Contract with the scope and terms and conditions as described herein
- B. Addenda dated July 14, 2016; July 27, 2016; August 3, 2016; and August 4, 2016,
- C. RFP solicitation dated July 14, 2016
- D. Revised proposal dated 1/31/2017
- E. Subsequent clarification and presentation dated 10/11/2016; 11/4/2016; 11/8/2016; 11/18/2016; 12/2/2016; 12/7/2016; 1/9/2017; 1/25/2017
- F. Offeror's proposal dated 8/22/2016

PRECEDENCE OF CONTRACT DOCUMENTS: In the event that there is a conflict between any of the terms and conditions of this Contract and any of the Incorporated Contract Documents, the terms of this Contract shall apply. In the event that there is any conflict between the Contractor's Proposal and any of the Contractor's negotiation responses and clarifications, or between one or more of the Contractor's negotiation responses and clarification documents, the most recent document shall apply. If there is a conflict between the General Terms and Conditions and the Special Terms and Conditions, the Special Terms and Conditions shall take precedence.

CONTRACT CLAIMS: Any contractual claims shall be submitted in accordance with the contractual dispute procedures set forth in the Commonwealth of Virginia Procurement Manual for Institutions of Higher Education and their Vendors.

- I. **STATEMENT OF WORK:** The Contractor shall provide, while using the mutually agreed upon latest affordable technology, on-site management of student and faculty/staff mail, express mail, copying, printing (in-house, and subcontracted); simple bindery services; scanning; minimal document destruction; managed print, including but not limited to: network print, cloud print, pay-to-print; and related services, within UMW-designated spaces on existing University properties, or properties to be leased, purchased, built, or acquired by the University in any manner throughout the life of the contract. These services shall be provided in accordance with the University's established contract goals:

- Information and recommendations regarding new and innovative technology and trends available in the industry to the University Contract Administrator;
- Ongoing self-examination to bring about effective programs in UMW's copy and mailing services - take initiative in exploring and instituting improvements in copy and mailing services;
- An operation that functions in a fiscally responsible manner within a compact campus footprint;
- An established methodology for quality control in any re-organization of current processes and services, in conjunction with the University Contract Administrator;
- Reduction of the physical footprint of the Copy Center and co-location of the operation with the campus Bookstore or other space as mutually agreed upon with the University;
- Enhancement and expansion on its sustainability values and practices;
- Continuous improvement and enhancement of the level of service and client satisfaction on campus;
- Products, prices, location of services, types of facilities, and special promotions that are responsive to consumer demand;
- Ongoing conversations with, marketing to, and training of all faculty and staff in the use of the networked MFDs as the primary print device;
- A Plan for marketing and implementation of a program for reduction of desktop printers that is designed to gain top-down organizational approval and support.

A. GENERAL CONTRACT REQUIREMENTS:

1. Responsibilities of the Contractor:
 - a. The Contractor shall reimburse UMW for the cost of voice and data lines used in its operation on a monthly basis. *It is to be noted that these costs may fluctuate over the term of the contract. UMW will provide documented invoice copies.*
 - b. For use of credit cards, the Contractor shall maintain an analog connection, including provision and maintenance of credit card terminals) or install a certified PCI Council's P2PE solution, also provided and maintained by the contractor, with UMW IT approval.
 - c. All contractor staff must adhere to the University's current Network and Computer Use policy. <https://www.google.com/url?q=http://www.boarddocs.com/va/umw/Board.nsf/files/8XUKM6521E61/%24file/E.4.4.%2520Network%2520and%2520Computer%2520Use%2520Policy.pdf&sa=U&ved=0ahUKEwiNrMGE6u7NAhVB5yYKHb6LBVoQFggGMAE&client=internal-uds-cse&usq=AFQjCNG1QjQYeRfT-sDkfjps5hYm1moRVg>
 - d. The contractor shall be responsible for maintaining a PCI compliant environment and is subject to an audit (by UMW or a designated third party) on an annual basis.
 - e. All contractor staff shall be required to obtain and display a UMW parking decal. *Currently there is no cost to Contractors for the parking decal. If, at a future time, UMW assesses a parking fee, Contractors shall be responsible for ensuring their employees adhere to campus parking regulations and pay any incidental fees.*
 - f. Sustainability: Contractor shall be charged with responsibly recycling all toner cartridges used within its operation.
 - g. Maintenance of equipment and space: Contractor shall be responsible for the upkeep of the post office operation and copy center; including all equipment, and vehicles, all of which shall be kept clean and in a state of good repair.
 - i. The Contractor shall maintain assigned space in a clean and safe condition and return it to the University in the same or better condition as when received, normal wear and tear excluded.
 - ii. The Contractor shall not make any physical improvements or permit any physical improvements to the premises without the prior written approval of the University Contract Administrator. Such work *required by the Contractor* and approved by the University shall be completed at the Contractor's expense, unless mutually agreed to otherwise.
 - h. Housekeeping: Contractor shall be responsible for gathering trash and other recyclables for UMW housekeeping pick-up and disposal with exception of aforementioned toner cartridges.

- i. Contractor Staffing Requirements: Background Screens, Bonding: Contractor Personnel may have access to confidential information such as credit card numbers or other highly sensitive data. The Contractor shall insure that all contractor personnel sent to work on property of the University of Mary Washington are bonded and insured; copies of which must be provided to the University prior to the first day of work.
 - i. Contractor shall provide priority consideration, within its standard recruitment process, to current copy center and post office personnel for positions available under its operations.
 - ii. All contractor staff considered for employment on any property owned, leased or otherwise acquired by UMW, shall require a driving record, Virginia State Police Criminal history, nationwide criminal history or other University-specified types of background check; the cost of which shall be incurred by the Contractor. All criminal conviction information shall be provided to the University prior to the candidate being accepted into the position. Information from background checks must include, but not be limited to: any and all criminal convictions, the charge(s) and date(s) of occurrence, the disposition/sentence (if any), jurisdiction, and type of court. The University prefers to receive ALL criminal conviction historical information, not just the most recent seven (7) years of data.
2. UNIVERSITY RESPONSIBILITIES: UMW will -
 - a. Provide Physical space(s) for Mail, Copy Center, Basic housekeeping services, telephone hardware, access and internet connections.
 - i. *The University reserves the unilateral right to add, delete or change the location of any existing or future space provided by the University under this contract.*
 - ii. The University will work with the Contractor relative to notice and operational matters that may be associated with any necessary space changes.
 - iii. Current space provided at contract commencement includes existing Mail Services space at Woodard Campus Center. The Copy Center Operation will begin the contract within existing space in Lee Hall with the expectation that through this contract, the Bookstore Space will likely be reconfigured and the Copy Center will be moved into the Bookstore, at the earliest available time.
 - b. Provide a reserved parking space within the University's Alvey parking deck for a contractor-owned electric golf cart used for campus deliveries, and a reserved parking space in the Monroe Hall lot for a second Contractor-owned mail vehicle.
 - c. Maintain responsibility for the spaces' walls, windows, painting, electrical and plumbing, HVAC, and exterior upkeep, excluding repairs due to damage caused by the Contractor's negligence or destruction. Any necessary repairs or problems identified in these areas must be noted by the Contractor, and reported to the Contract Administrator immediately.
 - d. Maintain responsibility for basic housekeeping duties; such as vacuuming, trash removal, and recycling; this does not include the disposal of toner cartridges.
 - e. Conduct periodic inspections of facilities for quality control, maintenance performance, conservation efforts, and overall operational effectiveness.
 - f. Provide secure physical space for Contractor-owned servers within UMW server room located in Hurley Convergence Center (HCC) and a process for Contractor access as necessary.
 - g. UMW will provide a designated Virtual Local Area Network (VLAN). Internet access will be provided for business purposes only and is subject to applicable UMW policies.
 - h. Maintain a provider for payment gateway interface for using EagleOne for Pay-to-Print.
3. MONTHLY REPORTING AND DELIVERABLES:
 - a. The Contractor shall be required to meet monthly with the UMW Contract Administrator to review data on daily operations, service usage, customer complaints, invoice processing, and revenue figures for the period, and other issues deemed necessary by UMW and/or the Contractor, including, but not limited to, continuous analysis and reporting to the Contract

- Administrator regarding trends, process and other potential improvements, market information and revenue.
- b. The Contractor shall provide the results of regular and continuous analysis of equipment, technologies, client meetings and satisfaction level feedback including any survey results, marketing opportunities, and any other data applicable to achieve UMW contract goals, on a monthly basis.
 - c. Required Reports shall include but not be limited to:
 - i. Daily shipping reports (contractor shall maintain and provide to UMW upon request);
 - ii. The Contractor shall process charges electronically to the University and potentially others on a monthly basis or as instructed by the Contract administrator;
 - iii. Itemized monthly statements using UMW codes for decentralized copiers, Copy Center operations and mail services;
 - iv. Machine repair and maintenance history on a monthly basis;
 - v. Upon request, the University will be provided month to date and year to date usage and billing reports per machine;
 - vi. Monthly reporting of newly contracted accessing entities.
4. EDUCATION AND MARKETING: The Contractor shall -
- a. Train, and retrain users, as necessary, on all decentralized machines; and promote, via various means, the advantages of the MFDs (i.e., departmental savings.)
 - b. Market and promote the services available in the UMW Copy Center and Post Office, to the campus community, on a scheduled basis.
 - c. Annually consult with high-volume print departments, including, but not limited to; University Relations, Alumni Relations, Admissions, Athletics, Student Activities and Engagement, and Student Affairs, reporting findings to the Contract Administrator.
 - d. Provide the Contract Administrator advance notice of any United States Postal Service (USPS) or other rate changes, *at minimum*, two weeks prior to the new rates taking effect.
5. TECHNOLOGY:
- a. Costs associated with professional services for Banner integration, including software for account billing for authorization of print/copy functionality, including EagleOne, shall be included in the monthly management fee.
 - b. Applications (Apps) that are available to the MFD equipment shall be provided to the University by the Contractor at no cost to the University. These apps may include, but are not limited to: One-Drive, Google drive, DropBox, Box, etc.
 - c. The Contractor shall manage and maintain 2 (two) Contractor-owned physical print servers in cooperation with UMW IT. The first server will be located at the Fredericksburg Data Center (located in the Hurley Convergence Center) and will contain 2 (two) virtual servers configured to balance the print load for all sites. The 2nd server will be located at our Stafford Server room (Stafford South) to handle the print load at Stafford and serve as a redundant server for the Fredericksburg site.
 - d. In the Fredericksburg Data Center, UMW will only provide rack space to accommodate either a 1U or 2U square hole standard 19 inch rack mount server, 2 (two) power outlets (1 (one) A side and 1 (one) B side) to accommodate 208V C13 plugs on a power strip, and patch panel and switch port access to accommodate up to 5 network ports (2 (two) ports on the A side at a 1 GB network connection each and 2 (two) ports on the B side at a 1GB network connection each, and 1 (one) port for a remote access controller at a 100 MB network connection), and a Cisco LACP protocol access virtual LAN (vLAN) dedicated to the copy and print services.
 - e. The Contractor shall provide all appropriate power and network patch cables at appropriate lengths and colors. In the Fredericksburg Data Center, the 1 GB network patch cables should be no longer than 7 (seven) feet Category 6 (CAT 6) each and should not be blue or green in color. The 100 MB network management patch cables should be no longer than 7 (seven) feet Category 6 (CAT 6) each and should not be blue or green in color. For each port in the Data Center, 2 (two)

patch cables will be required (up to 10 cables required total). Power cables should be standard C13/C14 cables and no longer than 6 (six) feet in length and any color though black is our standard.

- f. In the Stafford Server Room, UMW will only provide rack space to accommodate either a 1U or 2U square hole standard 19 inch rack mount server, 2 (two) power outlets to accommodate 208V C13 plugs on a power strip, and patch panel and switch port access to accommodate up to 5 network ports (4 (four) ports at a 1 GB network connection each to 2 (two) switches and 1 (one) port for a remote access controller at a 100 MB network connection), and an access virtual LAN (vLAN) dedicated to the copy and print services.
- g. The Contractor shall provide all appropriate power and network patch cables at appropriate lengths and colors. In the Stafford Server Room, the 1 GB network patch cables should be no longer than 25 (twenty-five) feet Category 6 (CAT 6) each and should not be blue, yellow, or green in color. The 100 MB network management patch cables should be no longer than 25 (twenty-five) feet Category 6 (CAT 6) each and should not be blue, yellow, or green in color. For each port in the Server Room, 1 (one) patch cable will be required (up to 5 cables required total). Power cables should be standard C13/C14 cables and no longer than 6 (six) feet in length and any color though black is our standard.

B. COPY/PRINT CENTER:

1. The Contractor shall provide on-site staffing, equipment, and management (labor) of a central copy center (for high volume production and finishing work), and shall maintain all decentralized networked multifunction devices (MFDs) distributed throughout the campus, including public MFDs (pay-to-print).
2. Contractor shall maintain a method for copy or print jobs to be accepted online, through campus mail, or through walk-up counter service by students, faculty, staff and the public.
3. Completed jobs shall be delivered by campus post office delivery staff, included in daily mail runs, or via client pick-up at the counter if requested by the client.
4. The Contractor shall provide secure means to produce and deliver any confidential copy, print, or similar job accepted in the Copy Center. Signs shall be prominently displayed, by the contractor, in the Copy Center, to inform and remind all users that copyright laws apply; and that users are responsible for confirmation of rights to make copies for an intended use.
5. Copy/Print Center Hours: (Ref. Attachment A)

C. POST OFFICE & MAIL SERVICES:

1. The Contractor shall provide daily management (including on-site staffing, equipment, supplies) of a physical post office located within Woodard Hall, and Eagle Landing (upper class apartments), where a second bank of mailboxes is located.
2. The Contractor shall receive and sort incoming U.S.P.S. mail, and provide Faculty, Staff, Departmental mail delivery to numerous locations daily, M-F, by the post office staff, via Contractor-owned transportation, according to the mail-run schedule (Ref. Attachment F, Mail Run Schedule).
3. Within the physical Post Office location, the Contractor shall provide retail services; including, but not limited to the sale of stamps, shipping of domestic and international packages, certified, registered, insured, and express mail services.
4. Contractor shall advise all clients, UMW and otherwise, of limitations of liability for mailing, including requirement of value.
5. Bulk mail shall be transported to the U.S. Postal Service, for mailing, which is located on Rt. 17 in Stafford, by the Contractor staff, via Contractor-owned transportation, based upon a mutually agreed schedule.
6. Bulk mail transported to the U.S. Post Office shall be noted on a Bulk Mail Form which shall be available on the Post Office web page for clients.
7. The Contractor shall sort mail for the Stafford Campus, Belmont, and the James Monroe Museum and Memorial Library and deliver as part of the mail run.

8. Dahlgren campus mail shall be sorted and gathered by the Contractor in the Post Office, and mailed once per week to the Dahlgren campus.
 9. Contractor shall provide over the life of the contract a Managed Services Analyst, who will assess the current state of the operation.
 10. If at any point during the term of the contract, the volume of package delivery diminishes, the costs of mail management services shall be adjusted downward. If it is deemed that the volumes have decreased by 20%, then both parties shall agree to modify the contract to reduce contractor staff as necessary, and the labor cost to the University.
 11. Post Office Hours: (Reference Attachment B)
- D. Decentralized Print Multi-function Devices (MFDs):
1. The Contractor shall provide, own, and maintain a decentralized fleet of MFDs located throughout UMW properties, including pay-to-print devices.
 - a. Equipment Repair requests shall be addressed within four (4) UMW business hours following notification of need for repair. UMW business hours are 8AM – 5PM, Monday through Friday.
 - b. Any test copies made by the contractor technician during repairs shall not be chargeable to the University.
 - c. Copier Moves: After initial installation, UMW may request the Contractor to move the copier to an alternate location within UMW. The Contractor shall provide moves equivalent to no more than one move per copier per year and shall complete the copier move and full set-up (ready for operation) within seven (7) business days after receipt of a request from the Contract Administrator.
 2. All MFDs shall be “follow-me” print capable.
 3. The Contractor shall be responsible for setup, maintenance of equipment, repair, toner replenishment, and usage tracking and chargeback submittals by individual department for MFD decentralized Fleet.
 4. For pricing structure for MFD chargeback reference Attachment H.
 5. For Retail Pricing for pay-to-print (Public printers), reference Attachment C.
 6. Upon written notice from the University of machine non-performance, Contractor shall have thirty (30) days to cure the documented performance issue(s). The University reserves the right to request removal of such non-performing machine(s), following failure to cure, without penalty. Evidence will consist of service call logs, meter readings, email requests for service, or other documentation. The University may request replacement of such a machine with equipment in operational status. The Contractor shall retain responsibility for analysis of and suggestions for disposition of machines with evidenced declining usage, which is not based on operational status, upon mutual agreement with the University Contract Administrator.
- E. Pay-to-Print (Cloud printing):
1. Contractor shall provide equipment, technology, software and IT support included in the monthly management fee for Pay-to-Print.
 2. Cloud printing functionality shall be provided by the Contractor (Phase I), initially, through a transfer of licensing with Pharos from UMW to the Contractor for use on five (5) specified MFDs located in Simpson Library (one black & white and one color machine), Trinkle Hall, Combs Hall and Stafford Library; as well as all lab printers as identified in Attachment D.
 3. Payment shall be able to be made via EagleOne or cash using existing coin towers. Phase II of operation may require that the use of coin towers is discontinued; or new coin towers (equipment) shall be provided by the contractor, via mutual decision between the Contractor and the University Contract Administrator.
 4. For pricing structure for pay-to-print, reference Attachment C.
 5. All revenues resulting from Pay-to-Print model shall be 100% payable to UMW (Ref. Attachment C, Retail Pricing).

6. Contractor shall provide paper replenishment for publicly accessible MFDs during mail runs on weekdays, and shall provide replenishment of paper in sufficient supply on Friday evenings for weekend use by clients.
7. During Phase II, a conversion of service of existing Pay-to-Print MFDs with addition of Monroe, Jepson, Mercer, Woodard, HCC, UC, and other existing Pay-to-Print labs using PaperCut software.
8. Contractor shall provide tracking of the service via iTools program.
9. SmartPrint shall be used for meter collection. The cost for SmartPrint is included in the monthly fee (reference Attachment H).

F. DEPLOYMENT TIMELINE / PHASED APPROACH:

1. **PHASE 1, TRANSITION:** The Contractor shall provide equipment, labor and services to replicate the existing systems and processes in place, in the existing locations; including the UMW Copy/Print Center, the UMW Post Office, Managed Print Services on a one for one basis, and Pay-to-Print Services on a one for one basis. Department Chargeback processing ability shall be provided by the Contractor. (Reference Attachment I, Deployment/Transition Guide/Plan)
 - a. Contractor shall cooperate with UMW and incumbent contractor during implementation for existing equipment final meter reads, de-installation and certification of cleansing of hard drives, etc., for both mail and copy operations.
 - b. If during implementation, additional equipment is needed to meet the service level required by UMW and described in the Contractor's final proposal, the additional goods or services shall be provided without additional cost to UMW.
 - c. Contractor shall, in cooperation with UMW, review and document all current processes and procedures to ensure a smooth transition between providers. Contractor shall facilitate the funding and transfer from one postage account to another with no interruption in the daily mailing processes.
2. **PHASE II, TRANSFORMATION:** After Analysis of existing UMW Copy/Print Center and UMW Post Office Location(s), deployment of Multi-function Devices (MFDs), all existing processes, all existing technology, level of service, costs and revenues, survey results, usage data (broken down by department, MFD locations, copy or job type), and any other data accumulated by the Contractor, the Contractor shall present to UMW a plan for Phase II of the operation, in conjunction with UMW Contract Goals.
 - a. A plan must be presented to the UMW Contract Administrator no later than seven (7) months after commencement of contract, which shall reflect the University's goals to provide the contracted services.
 - i. A relocation or co-relocation of Copy/Print Center and/or the Campus Post Office may occur during Phase II. The footprint and timeline for construction and transition of this operation shall be determined via mutual agreement between the University and the Contractor.
 - b. Within twelve (12) months of commencement of contract, the contractor shall provide to the University a plan for reduction of "desktop" and/or networked printers; based on achieving institutional support, inclusive of marketing and departmental buy-in approach, suggestions for incentivizing buy-in, and analysis of any savings to the University, should it enact such a plan.

II. FINANCIAL STRUCTURE: (Reference Attachment H, PRICING)

A. INVOICING:

1. UMW Pricing is detailed in Attachment H.
2. A la carte pricing for all accessing entities is detailed in Attachment G.
3. The Vendor shall separate the equipment monthly cost (lease) from the maintenance service costs (maintenance, Preventative Maintenance and covered supplies) on each invoice and provide an itemized billing statement by machine ID.
4. This report shall also clearly indicate the machine(s) location, make, model & serial #.

5. Where usage is a factor, the statement will detail the beginning and ending meter read for the billing period.

B. ACCESSING ENTITIES:

1. Collectively the accessing entities to which SPS is providing Goods and Services will be known as "Accessing Entities" within this agreement.
2. SPS shall provide its Goods and Services to the University, and as requested, all other VASCUPP or Virginia Higher Education Procurement Consortium "VHEPC" member institutions, all other VASCUPP member affiliated entities.
3. Any Accessing Entities, other than the University that desire to utilize this Agreement will enter into a separate negotiation of final terms and selection of Goods and Services specific to their respective Entity.
4. Any Accessing Entities will be responsible for providing Contractor with Tax Exempt certification, as appropriate.

C. FINANCIAL INCENTIVES:

1. In addition to the pricing structure detailed herein or referenced by attachment, SPS agrees to provide UMW and each Accessing Entity with a further incentive regarding total cumulative spend from all Accessing Entities, including UMW, plus any UMW expansion beyond scope/base of original contract (Year One) in the amount corresponding to the scale below.
2. Rebate/savings to UMW and all accessing entities: Contractor shall provide UMW and all accessing entities with a rebate based on the total cumulative spend of all entities, inclusive of UMW expansion of scope/base of original contract (Year One) after the first 12 months' contract review and at each annual contract anniversary date thereafter.

TOTAL CONTRACT SPEND of ALL ACCESSING ENTITIES	REBATE %*
\$0 - \$199,999	0.50%
\$200,000 - \$ 400,000	0.75%
\$400,001 - \$700,000	1.00%
\$700,001 - \$1,000,000	1.50%
\$1,000,001 - \$3,000,000	2.00%
\$3,000,001 - \$5,000,000	2.50%
\$5,000,000 - \$7,000,000	2.75%
\$7,000,000 and above	3.00%

**based on annual cumulative spend for all accessing entities.*

3. This discount shall be paid to the individual Accessing Entity, by the contractor, based on annual purchases on the annual anniversary date of each entity's signed contract. Contractor shall calculate the total annual purchases of all Accessing Entities, in excess of the original UMW contract base/scope, including any expansion spend by UMW alone, and/or additions of other accessing entities, and according to the corresponding discount structure scale; Contractor shall remit such amount as a rebate to all Accessing Entities, including UMW.
4. Accessing Entities may elect other methods to receive discount (such as early payment discount).
5. Each Accessing Entity may request/negotiate an onboarding fee (Capital Contribution) at the onset of the contract.
6. *Terms of rebate schedules will be reviewed on an annual basis at contract anniversary.*

D. AMORTIZATION OF CONTRACTOR CAPITAL CONTRIBUTION:

1. Contractor shall amortize the capital contribution (\$80,000) on a straight-line basis over the initial term of the contract (60 months), commencing July 3, 2017. Such amortization shall be charged as an operating expense of the operation. Once the investment is fully amortized, July 2, 2022, UMW shall own the investment.
2. Contractor shall provide a year-to-date accounting of the status of the amortization, which shall be included in the required monthly financial reporting.
3. If prior to the complete amortization of the investment any of the following events should occur; then, UMW shall reimburse the Contractor, within ninety (90) days of receipt of invoice, the unamortized portion of the investment.
 - a. The Agreement expires;
 - b. The Agreement is terminated.

III. **GENERAL TERMS AND CONDITIONS:** <http://adminfinance.umw.edu/procurement/files/2014/11/UMW-General-Terms-and-Conditions-Nov14.pdf>

IV. **SPECIAL TERMS AND CONDITIONS:**

ADDITIONAL EQUIPMENT:

Such equipment as needed by the contractor to fulfill contract-required services for the University shall be owned and maintained fully by the contractor, and shall be the contractor's responsibility to determine viability and to replace as necessary during the life of the contract (including but not limited to golf cart and mail vehicle).

ADDITIONAL GOODS AND SERVICES: The University reserves the right to request from the contractor to provide additional Goods and/or Services under similar and market-based pricing, terms, and conditions, and to make modifications or enhancements to existing services. Such additional Goods and Services may include other products, components, accessories, subsystems or related services that are newly introduced during the term of the Agreement. Such newly introduced additional Services will be provided to the University at favored nations pricing, terms, and conditions.

AUDIT: The contractor shall retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The agency, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period.

AVAILABILITY OF FUNDS:

It is understood and agreed between the parties herein that the University shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this contract. Other than for reasons of default or convenience as authorized by applicable termination clauses, the parties acknowledge that orders will be cancelled, and obligations of the parties will cease, only in the event of non-appropriation or if UMW's requirement no longer exists.

CANCELLATION OF CONTRACT:

The University reserves the right to cancel and terminate any resulting contract, in part or in whole, upon sixty (60) days written notice to the contractor (without penalty). In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party (without penalty), after the initial twelve (12) months of the contract period, upon sixty (60) days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation. If the University terminates the agreement for convenience during the Initial Term, the University will be responsible for any unamortized portion of the capital contribution.

It is agreed by both parties that should the Agreement with the Contractor terminate for reasons other than default, non-appropriation, or if UMW's requirement no longer exists, prior to the expiration of any equipment/vehicle lease(s), rental(s), buyout(s), and/or software licensing Agreement(s) provided by the Contractor to the University, the Contractor will continue to service the equipment/vehicle(s)/software and invoice the University for said services as set forth in the Statement of Work until the expiration of the equipment lease(s). Should the University elect not to retain the equipment/vehicle(s)/software, the University shall pay to Contractor any sums associated with early termination of such leasing, rental, or buyout arrangements as set forth in the Statement of Work, and de-installation charges, if applicable.

CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The contractor assures that information and data obtained as to personal facts and circumstances related to patients or clients will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the Code of Virginia. Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security of such information. Contractors shall allow the agency to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

CONTINUITY OF SERVICES: The Contractor recognizes that the services under this contract are vital to the University and must be continued without interruption and that, upon contract expiration, a successor, either the University or another contractor, may continue them. The Contractor agrees:

- (i) To exercise its best efforts and cooperation to effect an orderly and efficient transition to a successor;
- (ii) To make all Agency owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the contract to facilitate transition to successor; and
- (iii) That the University Contracting Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.

The Contractor shall, upon written notice from the University, furnish phase-in/phase-out services for ninety (90) days after this contract expires, or as negotiated, and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the University's approval.

The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations) and a fee (profit) not to exceed a pro rata portion of the fee (profit) under this contract. All phase-in/phase-out work fees must be approved by the University in writing (via purchase order, or other document as applicable) prior to commencement of said work.

COOPERATIVE PROCUREMENT/ADDITIONAL USERS - USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions, or any University affiliated agency and/or corporation may access any resulting contract if authorized by the Contractor. Use of this Agreement does not preclude any participating entity from using other agreements or competitive processes.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor shall notify the University in writing (email is acceptable) of any such entities accessing this Contract. The Contractor shall provide semi-annual usage reports for all entities accessing the Contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the Contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity, and will not be considered in default of the Contract no matter the circumstances.

E-VERIFY PROGRAM: Effective 12/1/2013, and pursuant to Code of Virginia, §2.2-4308.2., any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with any agency of the Commonwealth to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to such public contract. Any such employer who fails to comply with these provisions shall be debarred from contracting with any agency of the Commonwealth for a period up to one year. Such debarment shall cease upon the employer's registration and participation in the E-Verify program. *If requested, the employer shall present a copy of their Maintain Company page from E-Verify to prove that they are enrolled in E-Verify.*

FORCE MAJEURE:

The Contractor shall not be liable for delays, determined by the reasonable person standard, in the delivery or the rendering of any services or the fulfillment of its obligations under this Agreement due to unforeseen circumstances or causes beyond its control, including power outages, telephone outages, fire, civil disobediences, strikes, riots, rebellions, acts of terrorism or acts of God.

FRATERNIZATION: The University is entrusted with the safety of all students at all times. Any behavior by any contractor employee that is determined to be inappropriate by the Contract Administrator may be cause for request for removal of the contractor's employee from University property, at minimum, if applicable, and/or result in contract termination.

INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the University, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of materials, goods, or of any kind or nature furnished by the Contractor/any services of any kind or nature furnished by the Contractor, provided that such liability is not attributable to the sole negligence of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods or equipment delivered.

Notwithstanding any other provision of this Agreement, nothing in this Agreement shall be construed to give the Contractor any control over decisions relating to choosing the content of information copied or otherwise handled hereunder. The University warrants and represents that it violates no intellectual property rights of third parties by having the Contractor perform Services under this Agreement. The Contractor agrees to provide prominent signage in appropriate locations, reminding users of copyright laws and their responsibilities.

INDEPENDENT CONTRACTOR RELATIONSHIP: All persons employed by the Contractor in connection with the provision of Services shall be employees of the Contractor and not the University. In performing any and all of the services to be provided under this contract, the Contractor shall at all times and for all purposes be and remain an independent contractor and in no case and under no circumstances shall the Contractor or any of its employees, including but not limited to those of its employees actually performing any of the services, be considered or otherwise deemed to be employees or agents of the University for any purpose whatsoever. Accordingly, nothing in this agreement shall be construed as authority for the Contractor or its employees or agents to have the authority to make commitments which shall bind the University or to otherwise act on behalf of the University in any manner whatsoever except as the University may expressly authorize in writing. The Contractor shall be responsible for providing any federal or otherwise legally required benefits to its employees. The University will coordinate instruction to the Contractor's employees in matters related to

the scope of work, including, but not limited to, schedule, manner and means of work, etc., through the Contractor. The Contractor and its employees shall be paid via proper invoice, received from the Contractor for services rendered, in accordance with the contract. The Contractor's employees will not be subject to University employee training events (except safety, if applicable) and will not be expected to participate in University meetings providing business updates. It is understood that the University is not the exclusive client of the contractor; the contractor shall be entitled to do business with or hold contracts with other clients.

LIMITATION OF LIABILITY:

The Contractor shall not be liable for more than one hundred dollars (\$100) or the cost of document reproduction, shipping, mailing, mass mailing, or processing whichever is less, in the event of physical loss, damage or delay for any group of documents, envelopes, packages, mailings, or projects, unless a value above one hundred dollars (\$100) is declared by the University, and appropriate insurance requested accordingly. Mass mailings are defined as mailings of more than two hundred (200) substantially similar pieces of mail that have been sent within a calendar month. Contractor shall prominently display package insurance requirements in the University Post Office and shall advise all clients of necessity for additional insurance for any group of documents, envelopes, packages, mailings or project values exceeding \$100. Declaration of value will be affirmed via invoice copies provided to the Contractor at the time a claim is presented by UMW.

Excluding Contractor's indemnification obligations set forth in this Agreement, the Contractor's liability hereunder for any claim of whatever nature shall be limited to the insurance amounts stated below, provided that the Contractor submits all claims to its insurance carriers and uses its best efforts to ensure insurance claims are honored. If such claim is not covered by insurance after Contractor has made every effort to have the insurance claim honored, the Contractor's liability hereunder shall be limited to twelve (12) months of the then current contract value, or \$500,000, whichever is greater.

METHOD OF PAYMENT: To be considered eligible for payment, all invoices, received from the Contractor on a monthly basis, should be received at the following address and should reference the eVA purchase order *and* UMW contract numbers. *The Contract Administrator should be sent a duplicate electronic invoice for approval.*

University of Mary Washington
Attn.: Accounts Payable
1301 University Avenue
Fredericksburg, VA 22401

A. The contractor will be paid using one of the following three methods:

1. P-card (Charge Card): At the time of verified receipt of goods or services, if the Contractor accepts credit cards in payment, the University will authorize payment by P-card, currently Bank of America Visa. Any "Check-out fees" imposed by the contractor must be disclosed prior to the purchase and shall be detailed in a separate line item on the receipt at point of sale. No check-out fee or surcharge may be greater than 4% of the total sale. *If the contractor's eVA profile indicates acceptance of a credit card in payment, the Commonwealth will pay via credit card for invoices \$50,000.00 or less.*
2. "ePayables" through Bank of America: All payments under ePayables will have a *net 16* payment term. For more information about this payment option, please view <http://www.bankofamerica.com/epayablesvendors> or contact UMW's Accounts Payables department at payables@umw.edu.
3. Payment (by check or ACH) will be made 30 days after satisfactory performance of the contract in all provisions thereof and upon receipt of a properly completed invoice, whichever is later; in accordance with the Virginia Prompt Payment Act. Ref.: Code of Virginia, Sections 11-62.1 through 11-62.9; "Prompt Payment Act" memorandum issued by the Office of the Comptroller, June 27, 1984

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED:

1. Workers' Compensation - Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirements under the *Code of Virginia* during the course of the contract shall be in noncompliance with the contract.
2. Employer's Liability - \$100,000.
3. Commercial General Liability - \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. *The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.*
4. Automobile Liability - \$1,000,000 combined single limit. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle).

Additional Insurance:

Contractor represents and warrants that in addition to the minimum insurance coverage required by this Agreement, Contractor has obtained and will maintain for the duration of this Agreement, the following insurance coverage:

Professional Liability Insurance covering allegations for wrongful acts by SPS employees, service representatives or Account Executives, including errors and omissions during their service. Coverage is \$1,000,000 limit per occurrence and \$4,000,000 aggregate.

Commercial Umbrella Policy covering damage to third party bodily injury and/or property damage, auto liability, and/or claims related to employer's liability in excess of the limits per policies listed above. Coverage is for \$10,000,000 per incident or \$10,000,000 aggregate.

Employment Practices Liability covering damages for which Contractor is legally liable as a result of employment practice misconduct against current or prior Contractor employees. Coverage is \$5,000,000 per occurrence and \$5,000,000 aggregate, including 3rd party coverage.

Commercial Crime / Employee Dishonesty Insurance covering Contractor and University against Employee Dishonesty. Coverage is \$1,000,000 per occurrence.

Disability Covering Contractor employees against non-work related injury as required by state law.

NON-SOLICITATION:

The following restrictions do not apply to any Contractor employee previously employed by the University, nor do they apply to contracted employees being hired by the University for Positions outside of the scope of this Agreement.

During the term of this Agreement and during the one (1) year period immediately following the termination of this Agreement, the University agrees to the following restrictions on hiring Contractor's employees:

The University agrees not to suggest, encourage, or arrange for a Contractor employee who has worked at the University within the prior twelve (12) months to be transferred to the University's payroll without the express written consent of the Contractor. Written consent of the Contractor shall not be unreasonably withheld.

The University will not allow a former Contractor employee who has worked at the University within the prior twelve (12) months to work for the University without the express written consent of Contractor. Written consent of the Contractor shall not be unreasonably withheld. If the University hires a Contractor employee currently working at the University's premises for the same positions provided under this Agreement without Contractor approval, which shall not be unreasonably withheld, then the University will pay a conversion fee of 30% of the employee's base salary.

The University agrees not to hire the Contractor's Client Service Managers/Supervisors without the express written consent of the Contractor; and the Contractor shall not unreasonably withhold such consent.

PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that it may utilize, using its best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that it is as fully responsible for the acts and omissions of its subcontractors and of persons employed by the subcontractor as it is for the acts and omissions of his own employees.

RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for two (2) successive five-year periods, *under the terms and conditions of the original contract*. Written notice of the Commonwealth's intention regarding renewal shall be given approximately 90 days (or more) prior to the expiration date of each contract period.

All prices contained in this Agreement will be reviewed annually and based on the general economy, the Commonwealth of Virginia economy, and other economic factors, may be increased by up to two point five percent (2.5%) with written approval in advance by the University. The purpose of this modification shall be to ensure that the Contractor maintains the standards of service expected by the University by compensating the Contractor for price increases for supplies, benefits, wages, and overhead.

If the Contractor is required to increase wage and/or payroll burden costs at any time during the term of this Agreement as the direct result of any determination, order, or action by any applicable federal, state, or local governmental authority including prevailing wage and benefit requirements, the University and contractor shall mutually determine an equitable adjustment as necessary to compensate for any increase. The Contractor will notify the University in writing in advance of any mandated change affecting the contract in any way. Any changes to the contract shall be in the form of a written contract modification.

RIGHT OF REFUSAL/CONTRACTOR REPRESENTATION:

At any time, during any term of the contract, the University reserves the right to request replacement of on-site management or other direct representation of the contractor in order to preserve and protect the contract relationship and to ensure continued contract performance in alignment with University Contract goals.

SEVERABILITY: If any term or provision of this Agreement is found by a court of competent jurisdiction to be invalid, illegal or otherwise unenforceable, the same shall not affect the other terms or provisions hereof or the whole of this Agreement, but such term or provision shall be deemed modified to the extent necessary in the court's opinion to render such term or provision enforceable, and the rights and obligations of the parties shall be construed and enforced accordingly, preserving to the fullest permissible extent the intent and agreements of the parties herein set forth.

STANDARDS OF CONDUCT IN THE WORKPLACE: The University of Mary Washington, an agency of the Commonwealth of Virginia, strictly forbids harassment of any employee, applicant for employment, vendor, contractor or volunteer in the workplace*, on the basis of an individual's race, sex, color, national origin, religion, sexual orientation, age, veteran status, political affiliation or disability. The Commonwealth will not tolerate any form of retaliation directed against an employee or third party* who either complains about harassment or who participates in any investigation concerning harassment.

http://web1.dhrm.virginia.gov/itech/hrpolicy/pol1_80.html

*pursuant to the authority provided in Chapter 10 and 12, Title
2.2 of the Code of Virginia*

SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the University. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish the University the names, qualifications and experience of their proposed

subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.

SUBCONTRACTOR PAYMENTS

Contractor is hereby obligated:

- (1) To pay the subcontractor(s) within thirty (30) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
- (2) To notify the agency and the subcontractor(s), in writing, of the contractor's intention to withhold payment and the reason.

WARRANTY: All goods and services shall be fully guaranteed against defects in material and workmanship. Should any defect be noted by the University, the contractor will be notified of such defect or non-conformance. Notification will state either (1) that the contractor shall replace or correct, or (2) the owner does not require replacement or correction, but an equitable adjustment to the contract price will be negotiated. If the contractor is required to correct or replace, it shall be at no cost to the University and shall be subject to all provisions of this clause to the same extent as materials initially delivered. If the contractor fails or refuses to replace or correct the deficiency, the University may have the materials corrected or replaced with similar items and charge the contractor the costs occasioned thereby or obtain an equitable adjustment in the contract price.

WORK SITE DAMAGES: Any damages to existing utilities, equipment, finished surfaces and to the College's property caused by the acts or omissions of the Contractor's agents, employees or invites shall be repair/restored to the University's satisfaction at the Contractor's expense.

V. TECHNOLOGY TERMS AND CONDITIONS:

A. Definitions:

1. The "Agreement" includes the contract, this addendum and any additional addendums and attachments to the contract.
2. "University" or "the University" means University of Mary Washington, its trustees, officers and employees. The point of contact for the University is the contract administrator for this Agreement.
3. "Vendor" or "the Vendor" means the contractor, firm or organization that is selected to fulfill this Agreement, including any subcontractor selected by the Vendor to fulfill any portion of this Agreement.
4. "University Data" is defined as any data that the Vendor creates, obtains, accesses, transmits, maintains, uses, processes, stores or disposes of in performance of the Agreement. It includes all Personally Identifiable Information and other information that is not intentionally made generally available by the University on public websites.
5. "Personally Identifiable Information" (PII) includes but is not limited to: Any information that directly relates to an individual and is reasonably likely to enable identification of that individual or information that is defined as PII and subject to protection by University of Mary Washington under federal or Commonwealth of Virginia law.
6. "Security Breach" means a security-relevant event in which the security of a system or procedure involving University Data is breached, and in which University Data is exposed to unauthorized disclosure, access, alteration, or use.
7. "Service" or "Services" means any goods or services acquired by the University from the Vendor.

- B. Contractor shall certify that any software provided under the contract does not contain any locks, worms, counters, CPU references, virus, or any other device capable of halting the operations of the software and/or altering the data or the program(s).
- C. Contractor shall host their servers in the UMW Fredericksburg Data Center and the Stafford Server Room (ref. 1.A.5.c-g). The contractor shall be fully responsible for patching the operating system(s), application(s), Hypervisor(s) (VMware ESXi or Microsoft HyperV), and repairing any physical ailments that

may exist. The Contractor will have physical access to the Fredericksburg Data Center Monday – Friday during the hours of 8AM to 5PM (excluding UMW holidays). All other contractor access including all access to the Stafford Server Room and outside of the allotted times for Fredericksburg will be by appointment only. Access at all times shall require an authorized UMW escort. End users shall also be required to sign in and sign-out at the Fredericksburg Data Center for all visits.

- D. UMW will provide a private, dedicated print VLAN for each campus location. Any necessary inter site communication will occur via ELAN connections between campus locations. Access control may be implemented as needed per UMW Security Policy.
- E. UMW reserves the right to scan all devices and servers on the isolated vLAN with threat assessment software at any time; and may request the contractor to resolve any issues that are identified as a result of the scan, or provide an assessment of false positives or risks that require acceptance.
- F. Upon expiration of the specified warranty period and at the University's option, the contractor shall provide additional one-year periods of maintenance (including labor, parts, and travel). Maintenance shall not include external electrical work, providing supplies, and adding or removing accessories not provided for in the contract. Maintenance shall also not include repairs of damage resulting from: acts of God, transportation between state locations, negligence by state personnel, or other causes not related to ordinary use in the production environment in which installed.
- G. Any software product(s) provided under the contract shall be the latest version available to the general public as of the commencement of the contract.
- H. The University shall be entitled to any and all upgraded versions of the software covered in the contract that becomes available from the contractor if the software is covered under a maintenance/support agreement with the contractor. If the software is not continually covered under a maintenance/support agreement then the maximum charge for upgrade shall not exceed the total difference between the cost of the Commonwealth's current version and the price the contractor sells or licenses the upgraded software under similar circumstances.
- I. Unless otherwise stated in the contract, the software license(s) identified in the pricing schedule shall be purchased on a perpetual basis and shall continue in perpetuity. However the University reserves the right to terminate the license at any time, although the mere expiration or termination of this contract shall not be construed as intent to terminate the license. All acquired license(s) shall be for use at any computing facilities, on any equipment, by any number of users, and for any purposes for which it is procured. The University further reserves the right to transfer all rights under the license to another state agency to which some or all of its functions are transferred.
- J. The Contractor represents and warrants that it is the sole owner of the software or, if not the owner, that it has received all legally required authorizations from the owner to license the software, has the full power to grant the rights required by this solicitation, and that neither the software nor its use in accordance with the contract will violate or infringe upon any patent, copyright, trade secret, or any other property rights of another person or organization.
- K. All necessary software, to include any required client licenses, shall be provided from the Contractor at no additional charge to the University.

ATTACHMENTS:

- A. COPY CENTER OPERATION HOURS
- B. POST OFFICE OPERATION HOURS
- C. PAY-TO-PRINT RETAIL PRICING
- D. PAY-TO-PRINT LOCATIONS
- E. MFD LOCATIONS
- F. MAIL RUN SCHEDULE
- G. A LA CARTE PRICING
- H. UMW CONTRACT PRICING
- I. DEPLOYMENT/TRANSITION PLAN

Note: This public body does not discriminate against faith-based organizations in accordance with §36 of the Governing Rules (§23-38.88) or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, or any basis prohibited by state law relating to discrimination in employment.

CONTRACTOR

Signature: _____

Printed Name: Arthur C. Tatge

Title: COO, North America

Date: 5/8/17

FEI/FIN#: 13-3670421

Phone: 212/204-0990

Email: Art.tatge@swisspost.com

CONTRACTOR

Signature: _____

Printed Name: Dan Moscatiello

Title: CEO, North America

Date: 5/8/17

UNIVERSITY OF MARY WASHINGTON

Signature: _____

Printed Name: Melva A. H. Kishpaugh

Title: Interim Director, Procurement

Services

Date: 5/9/2017

ATTACHMENT A

COPY CENTER OPERATIONAL / RETAIL HOURS:

Monday – Thursday	8:00 AM – 7:00 PM
Friday	8:00 AM – 5:00 PM
Summer Hours; M-F	8:00 AM – 5:00 PM
Saturday & Sunday	CLOSED
<i>During University holidays or closures, the Copy Center is generally closed. Exceptions include, but are not limited to, winter break December Mailer production schedule, which is coordinated with the UMW Bookstore.</i>	

ATTACHMENT B

POST OFFICE OPERATIONAL / RETAIL HOURS:

Monday – Friday	8:00 AM – 5:00 PM
Retail Window Hours: M-F	10:00 AM – 4:30 PM
<i>During each new semester, the operation opens for a limited period on two Saturdays.</i>	

ATTACHMENT C

PAY-TO-PRINT RETAIL PRICING

TYPE – PUBLIC PRINT	WITH PAPER
B&W	\$0.10 / COPY
COLOR	\$0.30 / COPY

ATTACHMENT D

PAY-TO-PRINT DEVICES (as of March 2017):

<u>Description and Location</u>	<u>Function(s)</u>	<u>Manufacturer</u>	<u>Model</u>	<u>Tender(s) Accepted</u>
B&W Printer in Combs Lab 011	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Combs Lab211	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Combs Lab 349	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Jepson 108	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Jepson 308	Print	HP	LaserJet P3010	EagleOne
KM in Combs (2nd Flr Lobby area)	Copy, Print	KONICA MINOLTA	bizhub 223	EagleOne, cash/coin
KM in Trinkle (1st Flr Hallway)	Copy, Print	KONICA MINOLTA	bizhub 223	EagleOne
KM in Simpson Library	Copy, Print	KONICA MINOLTA	bizhub 423	EagleOne
Color Printer in Melchers 209	Print	HP	HP ETHERNET MULTI- ENVIRONMENT	EagleOne
B&W Printer in Melchers 209	Print	HP	LaserJet P3010	
B&W Printer in Mercer 202	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Mercer 222	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Monroe Lab 114	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Monroe Lab 320	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Trinkle B12	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Trinkle B9	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Woodard 205	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Hurley 130	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Hurley 2nd Flr Lobby	Print	HP	LaserJet P3010	EagleOne
B&W Printer in Stafford GH Labs	Print	HP	LaserJet P3005	EagleOne
KM in Stafford Library	Copy, Print	KONICA MINOLTA	bizhub 223	EagleOne, cash/coin

B&W Printer in Stafford Library	Print	HP	LaserJet P4015	EagleOne cash/coin - Jamex Bank
Color Printer in Stafford Library	Print	HP	Color LaserJet CP2025dn	EagleOne cash/coin - Jamex Bank
Sharp in Simp Library (reference side)	Copy, Print	SHARP	MX-3100N	EagleOne
B&W Printer Simpson Library Circulation side	Print	HP	LaserJet 600	EagleOne cash/coin - Jamex Bank
Color Printer Simpson Library Circulation side	Print	HP	Color LaserJet 4700	EagleOne cash/coin - Jamex Bank
B&W Printer Simpson Library Reference side	Print	HP	LaserJet 600	EagleOne cash/coin - Jamex Bank

ATTACHMENT E

PHASE I MFD LOCATIONS:

BUILDING	LOCATION / ROOM #
JAEC	Business Center – 1 st floor Kalnen Inn
	Alumni Center – 1 st floor
	2 rd Floor, Advancement
Belmont	
Brent Hall	Police Department
Combs	1 st Floor
	Rm. 208
	3 rd Floor
	Lobby (Public)
Dahlgren	2 nd Floor
Dupont	Rm. 325
Eagle Village	4 th floor, Suite 480 (Fin./Adm.)
	4 th floor, Suite 400 (SBDC)
	3 rd floor, University Relations
Goolrick	Rm. 106A
	Rm. 212
G.W. Hall	Rm. 103, President's Office
	Rm. 111
	Rm. 306
	Rm. (2 nd floor, Human Res.)
Hurley Convergence Center (HCC)	
Jepson Science	Rm. 202
James Monroe Museum & L.O.	
Lee Hall	1 st Floor, Talley Center
	Rm. 217, Acad. Services
	Rm. 232, Financial Aid
	Rm. 308 Career Services
	4 th Floor, Admission
	Bookstore
Marye House	
Mercer	Psychology
Monroe	2 nd Floor
	3 rd Floor
Physical Plant	Front Hallway
Pollard	Near Rm. 205
Simpson Library	Rm. 107
	Public - Color
	Public – Left
	Public - Right
	Rm. 113

Stafford	Library
	North
	South
Tennis Center	
Trinkle Hall	Rm. 121
	Rm. 226
	Near Rm. 104
Tyler House	Talley Center Admin. Office
University Center	Multicultural Center, 3 rd Floor
	SAE 3 rd floor
Warsaw	SBDC office
1201 William Street	
Woodard	Post Office
	Business Administration/COB

ATTACHMENT F

CAMPUS MAIL-RUN SCHEDULE: *

ON CAMPUS / OFF CAMPUS	BUILDING / LOCATION	DEPARTMENT(S)	SCHEDULED PICK- UP / DELIVERY TIME
OFF CAMPUS	James Monroe Museum & Law Office 908 Charles Street		8:30 – 10:15 AM
	Economics House – 1004 College Avenue	Economics	
	1201 William Street	Debate & Creative Writing	
	Executive Offices at Eagle Village	Foundation, University Relations, SBDC, Finance and Administration	
	The Stone House, Battlefield Athletic Complex; Hanover Street	Athletics, Sports Information	
	Physical Plant; 1202 Hanover Street	Facilities, Central Storeroom	
	Tennis Center, 1200 Hanover Street		
	Jepson Alumni Executive Center (JAEC), 1119 Hanover Street		
	UMW Apartments, William Street		
ON CAMPUS	Pollard Hall	Music	
	Simpson Library		
	Mercer Hall	Psychology	10:15 – 10:30 AM
	Woodard Hall	College of Business	10:30 – 10:45AM
	Monroe Hall	2 nd floor History & American Studies, Political Science, 3 rd Floor Geography, Sociology & Anthropology	
	Lee Hall:	Basement/1 st Floor including Talley Center for Counseling Services, EagleOne Card Center, Student Health	10:45 – 11:15AM
		2 nd floor Assistant Provost, Parking Management, Student Accounts & Cashiers, Academic Services, Registrar, Accounting, Financial Aid	
		3 rd floor including Kiosk and Bookstore, Admissions Office, Career Center office of Academic Services	
		4 th floor including Admissions staff office pick- up only, CIE (Center for International Education), BLS, Disability Resources	
	Trinkle Hall	1 st floor: National Latin Exam, Mathematics;	11:15 – 11:30AM
		2 nd Floor: Curriculum & Instruction College of	

		Education (COE), Classics, Philosophy & Religion (CPR)	
		Basement Level: Computer Science	
	Marye House	Dean of Student Life, Residential Life, Judicial Affairs	11:30 – 11:40AM
	Brent Hall	Police, Emergency Management, Public Safety	11:40 – 11:45AM
	George Washington Hall	Basement Level: IT/EAS,	11:45 – 12:00 Noon
		1 st Floor: Office of the President, VP for Admin. & Finance, Budget & Financial Analysis, Events & Conferencing, Dodd Auditorium	
		2 nd Floor: Human Resources	
		3 rd Floor: Provost, CIO, VP of Student Affairs, Diversity & Inclusion (James Farmer Scholars), Dean of College of Arts & Sciences, Institutional Research	
	Combs Hall	1 st Floor: Diversity & Inclusion, Summer Transition Program (STP), Prevention and Advocacy, Dean of College of Education, Historic Preservation, Rappahannock Scholars Program	12:00 – 12:10 PM
		2 nd Floor: Modern Languages & Literature	
		3 rd Floor: English, Linguistics & Communication	
	Tyler House	Talley Center for Counseling Services Annex Offices, 1 st and 2 nd Floors	12:10 – 12:20 PM
	Fairfax House	Currently Vacant	
	Hamlet House	Phonathon Center	12:20 – 12:25 PM
	University Center (UC)	1 st floor: Dining Services Administrative Offices	12:25 – 12:35 PM
		2 nd Floor: Center for Career & Professional Development, UC Coordinator	
		3 rd Floor: Student Activities & Engagement (SAE), Student Involvement Admin., Multicultural Affairs, Center for Honor,	

		Leadership & Service	
	Hurley Convergence Center (HCC)	IT Business Office	1:00 – 1:10 PM
	Jepson Science	Biology, Environmental Science, Geology, Physics, Chemistry	1:10 – 1:15 PM
	Goolrick Hall	Fitness Center	1:15 – 1:20 PM
		Athletics and Physical Education	
	DuPont Hall	Theatre & Dance	1:20 – 1:25 PM
	Melcher's Hall	Art & Art History	1:25 – 1:30 PM
	Ridderhoff-Martin Gallery		
	Lee Hall, 2 nd floor	Copy Center	1:30 – 1:40 PM
		Student Employment	
	Lee Hall	Admissions Office Only	
OFF MAIN CAMPUS	Stafford Campus	Buildings 1 & II	TBD
OFF CAMPUS	U.S.P.S.	Falmouth	TBD

**Times may vary by approximately 15 minutes.*

ATTACHMENT G

Pricing Structure: Attachment

SPS shall provide the following as base pricing for Goods and Services under standard terms and conditions of this contract.

University Mary Washington		
Cost Detail Accessing Entities		
Labor Rates for Accessing Entities	Mos Fee	
CSM	\$6,355.63	
CSA III - Mail	\$4,230.31	
CSA I - Mail	\$3,730.89	
CSA I - Mail	\$3,231.48	
CSA III - Repro	\$3,525.25	
CSA I - Repro	\$3,064.03	
CSA I - Part Time	\$1,468.86	
CSA I - Part Time	\$1,468.86	
Software	Mos Fee	
Space & Move - Calculation based on square footage		
Room Reservations	\$563	
Work Orders	\$557	
Assets	\$563	
Mail	\$557	
Visitor	\$130	
Print & Copy	\$557	
Inventory	\$557	
Reporting	\$125	
Print/IT Platform Services & All Inclusive Paper Cut	\$5,345	
Send Pro 3000	\$975	
Relay 4000	\$585	
ConnectRight Software	\$195	
Equipment (48 months)	Mos Fee	
Canon iR8505i	\$1,046.17	
HP Wide Format	\$563.99	
Canon C700	\$1,026.03	
Toshiba 2508a	96.17	
Toshiba 4508a	111.59	
Fax Machine Brothers/Lexmark Model	19.67	
B&W impressions in Copy Center (with/without paper)	0.0171	0.0105
Color impressions in the Copy Center (with/without paper)	0.0572	0.0506
MFD B&W impressions (with/without paper)	0.0146	0.008
Spiral Equipment (48 Months)	Mos Fee	
MBM Destroyit 3104CC Shredder 3/32" x 5/8" Cross Cut	46.49	
Challenge JF Single Spindle Floor Drill	59.31	
Challenge Titan 200 BC Paper Cutter w/ Plexiglass Shield	263.26	
Onyx HD7700 Ultima Electric Punch - 1 free die included	90.85	
Rhin-O-Tuff Onyx HD4170 Rhin-O-Roll Coil Inserter	16.36	

Preferred Pack PP-48ST 110V One-Step Shrink Wrap System	32.25	
JBUSA Speedy-Lam 330R10 10 Roller Laminator	31.07	
LJ-4 Heavy Duty table Top Jogger	21.65	
Other Equipment (48 Months)	Mos Fee	
iPod Touch	23.02	
Cell Phone	75.52	
Dell Optiplex	70.38	
Yamaha Adventurer Two Golf Cart or something similar	125.87	

SOFTWARE PRICING: Monthly pricing for user-based modules of iTools

Space & Move: calculation based on square footage	"a la carte"
Room Reservations	\$563.00
Work Orders	\$557.00
Assets	\$563.00
Mail	\$557.00
Visitor	\$130.00
Print & Copy	\$557.00
Inventory	\$557.00
Reporting	\$125.00
Print/IT Platform Services and All-inclusive PaperCut	\$5345.00
Address Cleansing: Includes the SendPro3000 and Relay 4000 with ConnectRight software to manage and cleanse address lists.	\$1765.00

Pricing Schedule

Directions for Completing Pricing Schedule:

1. Assuming the total current average volume for mail, copy, and decentralized MFDs identified in Attachments (F.1, G.1, G.2), pricing must include: proposed equipment, supplies, maintenance, staffing, reporting, and management systems.
2. Please provide the following fixed fee and variable fee (unit based or other) pricing for all services and equipment.

Required

1. Fixed monthly fee, Year 1 **\$ 42,981.47**

This fee must include staffing for mail and copy, management, contingent labor, proposed equipment, service (parts, labor, supplies), software fees, equipment including leases. Cost analysis should be included in multi-year schedule below, in section 5 below.

Impressions	#	Overage	
1. Number of B&W impressions in Copy Center*	0	\$ 0.0102	All overage fees are exclusive of paper.
2. Number of Color impressions in the Copy Center*	0	\$ 0.0506	
3. Number of B&W impressions**	0	\$ 0.0080	

*Included in monthly fixed fee

**Included for decentralized MFDs on a monthly basis; attach an itemized MFD inventory

2. Impact to contract for additional MFDs that are added during life of contract

Note: Cost for equipment is based on a 48 month term any equipment added during cost of term are TBD if desire to be co-terminus with contract

ATTACHMENT H

	MFD Type	Increase to Monthly Fee
1	Toshiba E Studio 2508a	\$ 96.17
2	Toshiba E Studio 4508a	\$ 111.59
3	Canon iR8505i	\$ 1,046.17
4	Canon C700	\$ 1,026.03
5	HP Wide Format	\$ 563.99

3. Financial Start-up Capital Contribution to support Copy Center relocation

\$ 80,000.00

Costs will be incurred by Contractor. Contractor shall provide auditable invoice copies to UMW.

4. MFD Option for Accessing Entities

Note: Cost for current equipment is based on a 48 month lease

Four year renewal cycle

	MFD Type	# Impressions	Monthly Cost	Overage Cost
1	Toshiba E Studio 2508a	0	\$ 96.17	\$ 0.0050
2	Toshiba E Studio 4508a	0	\$ 111.59	\$ 0.0050
3	Canon iR8505i	0	\$ 1,046.17	\$ 0.0050
4	Canon C700	0	\$ 1,026.03	\$ 0.0429
5	HP Wide Format	0	\$ 563.99	\$ -

6 (3) PaperCut Print Servers, (2) Phys. Hosts 1,850.00 Note: Not Included in the fixed monthly fee

*This form must be completed and returned with the proposal.
Any differing financial proposal should be included as a separate document and marked as "Alternate."

Pricing Schedule

5. Cost Analysis Detail and Renewal Costs, Offeror should complete matrix below:

	Year 1	Year 2	Year 3	Year 4	Year 5	Optional Renewal					Optional	
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12
Section 1. Copy Center	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Labor for CC & MFD	\$ 69,154	\$ 69,154	\$ 69,154	\$ 69,154	\$ 69,154	\$ 70,537	\$ 70,537	\$ 70,537	\$ 70,537	\$ 70,537	\$ 71,948	\$ 71,948
Equipment	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159	\$ 117,159
Maintenance	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663
Operating	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776	\$ 1,776
Operating/Admin/Profit	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993	\$ 75,993
Fixed Annual Fee to UMW	\$ 268,745	\$ 268,745	\$ 268,745	\$ 268,745	\$ 268,745	\$ 270,127	\$ 270,127	\$ 270,127	\$ 270,127	\$ 270,127	\$ 271,538	\$ 271,538
Section 2. Post Office	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Labor	\$ 140,502	\$ 140,502	\$ 140,502	\$ 140,502	\$ 140,502	\$ 143,312	\$ 143,312	\$ 143,312	\$ 143,312	\$ 143,312	\$ 146,178	\$ 146,178
Equipment	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328	\$ 25,328
Maintenance	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227	\$ 2,227
Operating	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029	\$ 9,029
Operating/Admin/Profit	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947	\$ 69,947
Fixed Fee to UMW	\$ 247,033	\$ 247,033	\$ 247,033	\$ 247,033	\$ 247,033	\$ 249,843	\$ 249,843	\$ 249,843	\$ 249,843	\$ 249,843	\$ 252,710	\$ 252,710
Total Annual Fee	\$ 515,778	\$ 515,778	\$ 515,778	\$ 515,778	\$ 515,778	\$ 519,971	\$ 519,971	\$ 519,971	\$ 519,971	\$ 519,971	\$ 524,248	\$ 524,248
Section 3. Decentralized MFDs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cost for proposed fleet	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

6. Commission

Copy Center: Commission on retail jobs (% or \$)

100%

Public MFDs: Commission on copies (% or \$)

100%

Other commission offered:

SPS best practice model is to provide the campus with a fully functional and cross trained staff based on a flat fixed monthly fee

All revenues from the operation that are in excess of the proposed flat fee would be 100% retained by the university

*This form must be completed and returned with the proposal.
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Pricing Schedule

*This form must be completed and returned with the proposal.
Any differing financial proposal should be included as a separate document and marked as "Alternate."

Pricing Schedule

Optional Renewal		
Year 13	Year 14	Year 15
\$ -	\$ -	\$ -
\$ 71,948	\$ 71,948	\$ 71,948
\$ 117,159	\$ 117,159	\$ 117,159
\$ 4,663	\$ 4,663	\$ 4,663
\$ 1,776	\$ 1,776	\$ 1,776
\$ 75,993	\$ 75,993	\$ 75,993
\$ 271,538	\$ 271,538	\$ 271,538
\$ -	\$ -	\$ -
\$ 146,178	\$ 146,178	\$ 146,178
\$ 25,328	\$ 25,328	\$ 25,328
\$ 2,227	\$ 2,227	\$ 2,227
\$ 9,029	\$ 9,029	\$ 9,029
\$ 69,947	\$ 69,947	\$ 69,947
\$ 252,710	\$ 252,710	\$ 252,710
\$ 524,248	\$ 524,248	\$ 524,248
\$ -	\$ -	\$ -
\$ -	\$ -	\$ -

*This form must be completed and returned with the proposal.
Any differing financial proposal should be included as a separate document and marked as "Alternate."

ID	Name	Duration	Start	Finish	% Complete	Responsible	Feb '17	Mar '17	Apr '17	May '17	Jun '17	Jul '17	Aug '17	Sep '17	
62	1-Discuss Data Collection templates (User, CAD, Modules)	1 dy	Fri 4/14/17	Fri 4/14/17	0%	E-PM,UMW IT,UMW PM	30	6	13	20	27	3	10	17	24
63	Define UMW Resources	1 dy	Fri 4/14/17	Fri 4/14/17	0%	UMW IT,UMW PM									
64	User Data Template	1 dy	Fri 4/14/17	Fri 4/14/17	0%	UMW IT,UMW PM									
65	2-Discuss iOffice URL with module licenses per SOW	1 dy	Fri 4/14/17	Fri 4/14/17	0%	E-PM									
66	3-Provide Design Documentation + Assign Homework (Assign all data templates)	1 dy	Fri 4/14/17	Fri 4/14/17	0%	E-PM									
67	Milestone 1: Design & Planning	1 dy	Thu 4/20/17	Thu 4/20/17	0%	E-PM,UMW IT,UMW PM									
68	Mail Module workshop	1 dy	Thu 4/20/17	Thu 4/20/17	0%	E-PM,UMW IT,UMW PM									
69	Define delivery structure, types, center-specific parameters	1 dy	Thu 4/20/17	Thu 4/20/17	0%	E-PM,UMW IT,UMW PM									
70	Define user roles and permissions	1 dy	Thu 4/20/17	Thu 4/20/17	0%	E-PM,UMW PM									
71	Copy Module workshop	1 dy	Thu 4/20/17	Thu 4/20/17	0%	E-PM,UMW IT,UMW PM									
72	Define Request types, priorities, center-specific parameters, preferences	1 dy	Thu 4/20/17	Thu 4/20/17	0%	E-PM,UMW IT,UMW PM									
73	Define user roles and permissions	1 dy	Thu 4/20/17	Thu 4/20/17	0%	E-PM,UMW PM									
74	Define request items, pricing	1 dy	Thu 4/20/17	Thu 4/20/17	0%	E-PM,UMW PM									
75	Collect Data (2-weeks)	10 dys	Mon 4/17/17	Fri 4/28/17	0%	UMW IT									
76	UMW to provide completed User Data Template	10 dys	Mon 4/17/17	Fri 4/28/17	0%	UMW IT									
77	UMW to provide copy request form / data template	10 dys	Mon 4/17/17	Fri 4/28/17	0%	UMW IT									
78	Milestone 2: Site Configuration & Build (flexible)	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
79	Activate iConnect URL with module licenses per SOW	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
80	iOffice to configure Categories, UserTypes, profiles	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
81	iOffice to load user data	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
82	iOffice to load Mail details	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
83	Configure mail delivery structure	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
84	Hardware configuration/install (if applicable)	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
85	Mail preferences	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
86	iOffice to Configure Copy Module	1 dy	Mon 5/1/17	Mon 5/1/17	0%	IO									
87	Configure Service Request Preferences + Notifications	1 dy	Mon 5/1/17	Mon 5/1/17	0%	IO									
88	Configure Service Request Priorities	1 dy	Mon 5/1/17	Mon 5/1/17	0%	IO									
89	Configure Service Request Catalogue	1 dy	Mon 5/1/17	Mon 5/1/17	0%	IO									
90	iOffice to Create Custom Reports (if applicable)	15 dys	Mon 5/1/17	Fri 5/19/17	0%	IO									
91	Milestone 3: Test & Pilot	5 dys	Mon 5/22/17	Fri 5/26/17	0%	E-PM,UMW PM									
92	Mail Module Validation & Testing	5 dys	Mon 5/22/17	Fri 5/26/17	0%	E-PM,UMW PM									
93	UMW SME + Sponsor validate Admin>Mail Settings & Preferences	5 dys	Mon 5/22/17	Fri 5/26/17	0%	E-PM,UMW PM									
94	UMW SME + Sponsor test Mail Operations: Check-in, Delivery, Search, Reports	5 dys	Mon 5/22/17	Fri 5/26/17	0%	E-PM,UMW PM									
95	Copy Module Validation & Testing	5 dys	Mon 5/22/17	Fri 5/26/17	0%	E-PM,UMW PM									
96	UMW SME + Sponsor validate Admin>Copy Settings & Preferences	5 dys	Mon 5/22/17	Fri 5/26/17	0%	E-PM,UMW PM									
97	UMW SME + Sponsor test Copy module Operations: Submit, Complete, Archive	5 dys	Mon 5/22/17	Fri 5/26/17	0%	E-PM,UMW PM									
98	Milestone 4: Delivery & Training	5 dys	Mon 5/29/17	Fri 6/2/17	0%	CSM,E-PM,UMW PM									
99	Admin/Operations Training	5 dys	Mon 5/29/17	Fri 6/2/17	0%	CSM,E-PM,UMW PM									
100	Mail Module Operations Training	5 dys	Mon 5/29/17	Fri 6/2/17	0%	CSM,E-PM									
101	Copy Module Operations Training	5 dys	Mon 5/29/17	Fri 6/2/17	0%	CSM,E-PM									
102	Reports Training	5 dys	Mon 5/29/17	Fri 6/2/17	0%	CSM,E-PM,UMW PM									
103	Implementation Sign-Off	5 dys	Mon 5/29/17	Fri 6/2/17	0%	UMW PM									
104	Integrations	18 dys	Fri 4/21/17	Tue 5/16/17	0%	E-PM,IO,UMW IT									
105	Automated User Provisioning	18 dys	Fri 4/21/17	Tue 5/16/17	0%	IO,UMW IT									
106	Workshop - Automated User Data Import	1 dy	Fri 4/21/17	Fri 4/21/17	0%	IO,UMW IT									
107	UMW SME Define file format for import file	1 dy	Fri 4/21/17	Fri 4/21/17	0%	UMW IT									
108	UMW SME & Sponsor Define authentication method	1 dy	Fri 4/21/17	Fri 4/21/17	0%	UMW IT									
109	UMW SME & Sponsor Define provisioning rules	1 dy	Fri 4/21/17	Fri 4/21/17	0%	UMW IT									
110	UMW SME & Sponsor Define uniqueID	1 dy	Fri 4/21/17	Fri 4/21/17	0%	UMW IT									
111	UMW SME & Sponsor Define User profile field mapping	1 dy	Fri 4/21/17	Fri 4/21/17	0%	UMW IT									
112	iOffice to provide SFTP account	5 dys	Mon 4/24/17	Fri 4/28/17	0%	IO									
113	UMW to post import file onto SFTP + notify iOffice	1 dy	Mon 5/1/17	Mon 5/1/17	0%	UMW IT									
114	iOffice to build automated process	10 dys	Tue 5/2/17	Mon 5/15/17	0%	IO									
115	UMW to test & validate import process	1 dy	Tue 5/16/17	Tue 5/16/17	0%	IO,UMW IT									
116	SAML Integration	16 dys	Fri 4/21/17	Fri 5/12/17	0%	IO,UMW IT									
117	Workshop - SAML Integration	5 dys	Mon 4/24/17	Fri 4/28/17	0%	IO,UMW IT									
118	UMW SME Define Identity Attribute	5 dys	Mon 4/24/17	Fri 4/28/17	0%	UMW IT									
119	UMW SME & Sponsor Define authentication Attribute	5 dys	Mon 4/24/17	Fri 4/28/17	0%	UMW IT									
120	UMW SME & Sponsor provide SAML metadata	5 dys	Mon 4/24/17	Fri 4/28/17	0%	UMW IT									
121	iOffice to configure connections	10 dys	Mon 5/1/17	Fri 5/12/17	0%	IO									
122	iOffice to provide updated SAML metadata with connections	10 dys	Mon 5/1/17	Fri 5/12/17	0%	IO									

ID	Name	Duration	Start	Finish	% Complete	Responsible	Feb '17	Mar '17	Apr '17	May '17	Jun '17	Jul '17	Aug '17	Sep '17
123	UMW to test & validate import process	10 dys	Mon 5/1/17	Fri 5/12/17	0%	IO,UMW IT								
124	Exchange integration	15 dys	Fri 4/21/17	Thu 5/11/17	0%	E-PM,IO,UMW IT								
125	UMW to provide URL and access to EWS w/ server name	15 dys	Fri 4/21/17	Thu 5/11/17	0%	UMW IT								
126	Complete impersonation rights to exchange server	15 dys	Fri 4/21/17	Thu 5/11/17	0%	IO								
127	iOffice to configure exchange server based on data & authorizations above (preferences)	15 dys	Fri 4/21/17	Thu 5/11/17	0%	IO								
128	UMW to test & validate connection for exchange within site bi-directionally	15 dys	Fri 4/21/17	Thu 5/11/17	0%	IO,UMW IT								
129	Workshop - Outlook Exchange Integration	15 dys	Fri 4/21/17	Thu 5/11/17	0%	E-PM,IO,UMW IT								
130	Mail Equipment	22 dys	Mon 5/1/17	Tue 5/30/17	0%	CD,CM,E-PM,NPST								
131	Mail Equipment Assessment	3 dys	Mon 5/1/17	Wed 5/3/17	0%	E-PM,NPST								
132	Place Order for Mail Equipment	0 dys	Fri 5/12/17	Fri 5/12/17	0%	CD,CM								
133	Install Mail Equipment	0 dys	Tue 5/30/17	Tue 5/30/17	0%	CSM,NPST								
134	Vehicles	38 dys	Mon 4/10/17	Wed 5/31/17	0%	CD,CM,CSM,E-PM,Sales								
135	Source for vehicles	10 dys	Mon 4/10/17	Fri 4/21/17	0%	E-PM								
136	Purchase vehicles	0 dys	Fri 4/28/17	Fri 4/28/17	0%	Sales								
137	Add vehicles to insurance policy	0 dys	Tue 5/2/17	Tue 5/2/17	0%	E-PM								
138	Initial vehicle maintenance/inspection	8 dys	Wed 5/3/17	Fri 5/12/17	0%	CD,CM								
139	Vehicle training for SPS staff	5 dys	Thu 5/25/17	Wed 5/31/17	0%	CD,CM,CSM								
140	People	20 dys	Thu 4/27/17	Wed 5/24/17	0%	CD,CM,HR,UMW PM								
141	Legacy Staff	9 dys	Thu 4/27/17	Tue 5/9/17	0%	HR,UMW PM								
142	Vendor Transition Announcement to Legacy Staff	0 dys	Thu 4/27/17	Thu 4/27/17	0%	UMW PM								
143	VIP Onboarding Program for Legacy Staff	1 dy	Fri 4/28/17	Fri 4/28/17	0%	HR								
144	Background checks complete for Legacy Staff	1 dy	Fri 5/5/17	Fri 5/5/17	0%	HR								
145	Offer Letters Sent to Identified Legacy Staff	0 dys	Fri 5/5/17	Fri 5/5/17	0%	HR								
146	Legacy Staff Deadline for Offer Acceptance	0 dys	Tue 5/9/17	Tue 5/9/17	0%	HR								
147	New Hires	28 dys	Mon 4/17/17	Wed 5/24/17	0%	CD,CM,HR								
148	New Hire Candidate Interviews	15 dys	Mon 4/17/17	Fri 5/5/17	0%	CD,CM,HR								
149	Background Checks Complete for New Hire Candidates	1 dy	Tue 5/9/17	Tue 5/9/17	0%	HR								
150	Offer Letters Sent to Identified New Hire Candidates	0 dys	Tue 5/9/17	Tue 5/9/17	0%	HR								
151	New Hire Deadline for Offer Acceptance	0 dys	Mon 5/15/17	Mon 5/15/17	0%	HR								
152	UMW Onboarding for all SPS-hired Staff	1 dy	Tue 5/16/17	Tue 5/16/17	0%	HR								
153	SPS Onboarding for SPS Manager	1 dy	Thu 5/18/17	Thu 5/18/17	0%	CD,CM,HR								
154	SPS Onboarding	1 dy	Wed 5/24/17	Wed 5/24/17	0%	HR								
155	Process	98 dys	Mon 5/1/17	Wed 9/13/17	0%	CD,CM,COO,CSM,ECG,E-PM,MKT								
156	Onsite Analysis	3 dys	Mon 5/1/17	Wed 5/3/17	0%	CD,CM								
157	Onsite Documentation	5 dys	Thu 5/4/17	Wed 5/10/17	0%	CD,CM								
158	Communication and Marketing Strategy	84 dys	Thu 4/27/17	Tue 8/22/17	0%	CD,CM,MKTG,Sales,UMW PM,CSM								
159	Change Management Communication Strategy Meeting	0 dys	Thu 4/27/17	Thu 4/27/17	0%	CD,CM,MKTG,Sales,UMW PM								
160	Signage	20 dys	Thu 5/4/17	Wed 5/31/17	0%	CD,CM,CSM,MKTG,UMW PM								
161	Review draft signage options with UMW	1 dy	Thu 5/4/17	Thu 5/4/17	0%	CD,CM,UMW PM								
162	Draft signage proofs ready for approval	0 dys	Wed 5/10/17	Wed 5/10/17	0%	CD,CM,MKTG								
163	Print signage	2 dys	Mon 5/15/17	Tue 5/16/17	0%	MKTG								
164	Hang new signage	1 dy	Wed 5/31/17	Wed 5/31/17	0%	CSM								
165	Intranet Updates	13 dys	Thu 5/4/17	Mon 5/22/17	0%	CD,CM,UMW PM								
166	Review information posting requirements	1 dy	Thu 5/4/17	Thu 5/4/17	0%	CD,CM,UMW PM								
167	Send information to the Intranet Administrator for posting	0 dys	Mon 5/22/17	Mon 5/22/17	0%	CM								
168	Email/Text Communication	8 dys	Thu 5/4/17	Mon 5/15/17	0%	CD,CM,E-PM,UMW PM								
169	Review standardized email messaging (iOffice notifications/alerts)	1 dy	Thu 5/4/17	Thu 5/4/17	0%	CD,CM,E-PM,UMW PM								
170	Load messaging to iOffice testing portal	2 dys	Mon 5/8/17	Tue 5/9/17	0%	E-PM								
171	Test messaging options	4 dys	Wed 5/10/17	Mon 5/15/17	0%	E-PM								
172	Social Media	11 dys	Thu 5/4/17	Thu 5/18/17	0%	CD,CM,E-PM								
173	Confirm Administrative protocols on existing/new social media account	1 dy	Thu 5/4/17	Thu 5/4/17	0%	UMW PM								
174	Student messaging drafts due for UMW approval	0 dys	Thu 5/18/17	Thu 5/18/17	0%	CD,CM								
175	Onsite Student Events	34 dys	Thu 7/6/17	Tue 8/22/17	0%	CD,CM,CSM,MKTG								
176	Prepare proposal for Fall kick-off event participation (New Student Orientation, etc.)	1 dy	Thu 7/6/17	Thu 7/6/17	0%	CD,CM								
177	Purchase giveaways/branded collateral	2 dys	Wed 7/12/17	Thu 7/13/17	0%	MKTG								
178	Onsite Student Event go-live	0 dys	Tue 8/22/17	Tue 8/22/17	0%	CD,CM,CSM								
179	Job Shadowing & Training	6 dys	Wed 5/24/17	Wed 5/31/17	0%	CSM								
180	Measure Staff for Uniforms	0 dys	Wed 5/17/17	Wed 5/17/17	0%	CSM								
181	End User Guide Draft Ready for Review & Approval	0 dys	Tue 5/23/17	Tue 5/23/17	0%	CSM								
182	Reporting Requirements Ready for Review & Approval	0 dys	Thu 5/25/17	Thu 5/25/17	0%	CD,CM,UMW PM								
183	Procedures Manual First Draft Ready for Review & Approval	0 dys	Tue 5/30/17	Tue 5/30/17	0%	CSM								
184	Full Team Meeting to Review Scope and SLAs	1 dy	Tue 5/30/17	Tue 5/30/17	0%	CD,CM,CSM								
185	Final Site Clean-up Before Go-Live	0 dys	Wed 5/31/17	Wed 5/31/17	0%	CSM								
186	Go-Live Date for Transition of Services to SPS	0 dys	Thu 6/1/17	Thu 6/1/17	0%	SPS								

[illegible]