



Request for Quote

FOR

**OFFICE 365 – PRODUCTIVITY SOFTWARE TRAINING FOR PERIOD OF:
MARCH 4 TO APRIL 12, 2019**

RFQ # 19-001

ISSUED DATE: FEBRUARY 7, 2019

SUBMISSION DATE: FEBRUARY 22, 2019 AT 5:00 P.M. ET

REQUEST FOR QUOTE – TIMELINES

ISSUED DATE:	February 7, 2019
PRE-QUOTATION QUESTIONS DEADLINE:	February 14, 2019 by 4:30 P.M.
ADDENDUM POSTED:	February 19, 2019 http://www.sclegal.org/procurement
SUBMISSION DUE DATE (via email):	February 22, 2019 BY 5:00 P.M. to:
RFQ Point of Contact (POC)	Pat Muller M.I.S. Information Technology Manager South Carolina Legal Services patmuller@sclegal.org

QUOTATIONS WILL NOT BE ACCEPTED AFTER 5:00 P.M. ON FEBRUARY 22, 2019

The following information is included with this document:

1. REQUEST FOR QUOTATION
2. ATTACHMENT A – DETAILED SCOPE OF SERVICES
3. ATTACHMENT B – COMPANY REFERENCES

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1 Purpose of the Request for Quotation (RFQ)

South Carolina Legal Services (SCLS) seeks quotes from qualified Computer Software Training vendors (herein after "Services"), in response to this Request for Quote (RFQ). The focus of the RFQ is to select a vendor to provide computer software training, specifically for Office 365 (0365) Workplace Productivity training.

2 Introduction to South Carolina Legal Services (SCLS)

SCLS is a 501(c) (3) non-profit statewide law firm that provides free legal services in a wide variety of civil (non-criminal) legal matters to eligible low income residents of South Carolina. SCLS is funded by grants from the Legal Services Corporation, the South Carolina Bar Foundation, local United Ways, state court filing fees, and other federal, state and local funding. There are ten (10) offices located around the state, one being our statewide Intake Office. There are currently 115 employees at SCLS. For more information about SCLS, please visit our website at: <http://www.sclegal.org>.

3 Scope of Services

SCLS is requesting 'fixed' rate quotes from qualified vendors that have extensive experience with training in computer software applications, specifically applications included in Microsoft Office 365 Workplace Productivity software applications, to provide 0365 training services to its employees.

SCLS is standardized on the Microsoft platform for end-user applications, currently utilizing MS Windows 10 Professional and Office 2013. SCLS recently purchased Microsoft Office 365 Enterprise E3 Licensing and is looking to efficiently and effectively leverage our investment in Office 365.

Microsoft Office 365 Workplace Productivity training in the following software applications is required:

- (a) Microsoft Word 2016 → Office 365
- (b) Microsoft Excel 2016 → Office 365
- (c) Microsoft Outlook 2016 → Office 365
- (d) Office 365 – One Drive for Business
- (e) Office 365 – Skype for Business
- (f) Office 365 - SharePoint Online / Site User

The desired outcomes of O365 productivity training will enable employees to:

- (a) Access/manipulate/save Word documents and Excel spreadsheets via 0365;
- (b) Use OneDrive to save/open/edit/share document;
- (c) Access Outlook online to view/send/manipulate email;
- (d) Access/use Skype for Business for online meetings;
- (e) Access/browse SharePoint Online team sites (site user);

4 Response Contents and Format

Examples of training request quotes may include the following:

1. Off-site (Vendor's Site) Venue

- a. Request to provide 0365 software training for one day to groups of SCLS employees (Specify minimum and maximum size of groups)
- b. Request to provide one day's 0365 training to 'basic' users (Specify minimum and maximum size of groups)
- c. Request to provide one day's 0365 training to 'super' users (Specify minimum and maximum size of groups)

2. On-site (SCLS Office Location)

- a. Request an instructor to provide one day on-site group 0365 training sessions at one of three (3) SCLS office locations (Charleston, Columbia, Greenville)
(Specify minimum and maximum size of groups).
- b. Request an instructor to provide one day on-site 'basic' group 0365 training sessions at one of three (3) SCLS office locations (Charleston, Columbia, Greenville)
(Specify minimum and maximum size of groups).
- c. Request an instructor to provide one day on-site 'super' group 0365 training sessions at one of three (3) SCLS office locations (Charleston, Columbia, Greenville)
(Specify minimum and maximum size of groups).

3. Please complete all sections of the RFQ. If additional material is required for one or more questions, please label attachments clearly and reference them in your quote. Your response to this RFQ will serve as the basis for the consideration of your potential as a vendor.

The format outlined in Section 4 above should be followed in order to provide SCLS with the necessary information on which to compare one quote to another. Please put **"Quotation for 0365 Software Training"** in the subject line of your email response.

All quotes shall be prepared in a clear and concise manner. Unnecessarily elaborate or glossy quotations are neither expected nor desired. The emphasis of the proposal should be on responding to the requirements set forth in this RFQ.

5 Potential SCLS Training Locations

Three SCLS offices have space that would accommodate up to 10+ users to attend each training:

- SCLS Charleston, 2803 Carner Avenue, North Charleston, SC 29405
- SCLS Columbia, 2109 Bull Street, Columbia, SC 29201
- SCLS Greenville, 701 South Main Street, Greenville, SC 29601

6 Additional Considerations

- Include all added value training and assessment services that your company offers in your quotation.
 - As an example of value-added training, SCLS would like to use Microsoft Flow in the creation of workflows. The ability to provide training for Microsoft Flow would be considered additional training services.
- Please provide a detailed syllabus for each class offering.
- Please provide your cancellation policy, with details around timeframe, training materials, etc.
- Please specify if training materials are not included in your quote.
- SCLS will have the option to replace a trainer if he/she does not meet SCLS' expectations of quality of training, knowledge of application, or training delivery approach, etc.
- SCLS has the right to cancel a portion or all of the service agreement at its discretion based upon any of the following criteria, including, but not limited to:
 - Budget constraints
 - Vendor's performance
 - Trainer's performance

7 Quote Requirements, Format And Submission

SCLS' hours of operation are from 8:30 a.m. to 5:00 p.m. Monday through Friday, except SCLS' statewide Intake Office whose hours of operation are: 9:00 a.m. to 6:00 p.m. Monday through Thursday and 8:30 a.m. to 1:00 p.m. on Fridays. The chosen vendor is expected to provide training within the timeframe of 9:00 a.m. through 4:30 p.m. either off-site or on-site.

The quote must include the following required items:

1. Details of costs associated with training services. Please specify if rates are 'fixed' or change for after-hours work.
2. Please provide any relevant company information and related cost information (such as travel, parking charges, or other types of charges/fees that may be incurred related to the training provided).
3. Please provide detailed information regarding the type of training materials you will provide for each training session.
4. Please include a general biography of all training instructors that would participate in the service agreement and provide training in the defined set of 0365 productivity applications.
5. Please use "Attachment B" to include three references of present and past clients where similar services were offered; preferably with non-profit entities.

SCLS will review all RFQ quotes from individual vendors/companies seeking to provide SCLS with specifics on how they would meet our goal and requirements.

8 Communications and Response

Pat Muller, Information Technology Manager, is the designated South Carolina Legal Services' representative for this initiative. For any information relative to this RFQ, please direct all inquiries to her contact information is as follows:

Pat Muller, M.I.S.
Information Technology Manager
South Carolina Legal Services
patmuller@sclegal.org
803-744-4173

9 Notice of Intent to Respond and Requests for Clarification of the RFQ

Please indicate your intention to respond, by email, to the above email address by the *Intent to respond* and *Questions Due* date as outlined in Key Dates below. In addition, please provide the contact details of the individual responsible for coordinating your RFQ response.

Should the proposer note any discrepancy, require clarification or wish to request interpretations of any kind, the proposer shall submit a written request to: Pat Muller, Information Technology Manager, by email to: patmuller@sclegal.org. Answers will be provided to all respondents by the Answers Provided date, as outlined in Key Dates below.

10 Proposal Process

Each proposer shall carefully examine the RFQ and any and all attachments provided with respect to this RFQ process. Proposers should familiarize themselves with all proposal requirements prior to submitting their proposal response.

11 Response Delivery Instructions

Please submit an electronic copy of your quotation response to the email address indicated in the Communications and Response section above. All quotation responses must be received on or before (4:30

p.m. ET) on the Proposals Due date indicated in the Key Dates table below. Proposals received following the deadline will not be considered.

12 Key Dates

Event	RFQ Issued	Intent to Respond and Questions Due	Answers Provided	Proposals Due	Evaluation	Negotiation/Award
Date	February 7, 2019	February 14, 2019	February 19, 2019	February 22, 2019	February 25 – 27, 2019	February 28 - March 1, 2019
Time		4:30 PM ET	4:30 PM ET	5:00 PM ET		

13 Review and Evaluation of Proposals

SCLS will review each quotation response submitted for responsiveness to the RFQ and its specifications after all quotation responses are received. SCLS will further evaluate each Proposer’s qualifications to satisfactorily perform the Services, the character of the Services that each Proposer is offering to perform, and any and all other objective criteria by which quotations may be ranked. SCLS may request clarifications about quotation proposals directly from one or more Proposers. In reviewing the proposals, SCLS may further consider the following:

1. Completeness of the quotation – 30%
 - a. Adherence to specified format and requirements
 - b. Detailed syllabus for each class offering
2. The qualifications, experience and record of past performance of delivering similar training services – 30%
3. Proposer’s understanding of the work to be completed based upon the clarity of the quotation proposal and responsiveness to this RFQ – 10%
4. Ability to provide adequate number of qualified and competent personnel – 10%
5. Cost – 20%

14 Vendor Selection and Notification

- a. SCLS shall notify those Proposers who will be considered for further evaluation upon completion of the review period, as set out in Key Dates above (Section 10).
- b. A Service Agreement will be deemed entered into upon its execution by an authorized SCLS representative and chosen vendor. Final approval of said Service Agreement is subject to the approval by Legal Services Corporation (LSC), if so required by SCLS’ Procurement Policy.
- c. No Service Agreement shall be binding upon SCLS until a Service Agreement is signed by duly authorized representatives of both the Proposer and SCLS.

15 General Terms and Conditions / No Obligation

If proposer elects to respond to this RFQ, submission of your quotation proposal assumes the acceptance of the following understanding:

1. SCLS reserves the right to reject any or all of the quotation proposals received in response to the RFQ, to waive irregularities or to cancel or modify the RFQ in any way, and at any time SCLS chooses, in its sole discretion, if SCLS determines that it is in the best interest of SCLS.
2. SCLS further reserves the right to make awards under this RFQ without discussion of the quotation proposals received. Proposals should be submitted on the most favorable terms from a technical, qualifications, and price standpoint.

3. Quotation proposals must be signed by an authorized officer of the company. Proposals must also provide name, title, address and telephone number for individuals with authority to negotiate and contractually bind Proposer, and for those who may be contacted for the purpose of clarifying or supporting the information provided in the quotation proposal.
4. SCLS will not be responsible for any expenses incurred by the Proposer in conjunction with the preparation of any proposal with respect to this RFQ.
5. The submission of a proposal shall not in any manner oblige South Carolina Legal Services to enter into a service agreement or to be responsible for the costs incurred by your company in responding to this request.
6. SCLS' selection of a Proposer through this RFQP is not an offer and SCLS reserves the right to continue negotiations with the selected proposer until the parties reach a mutual agreement.

16 Agreement of Non-Disclosure

This document is considered to be proprietary and shall not be disclosed to any other party. It is designed, developed and submitted to potential partners of South Carolina Legal Services solely for the benefit of South Carolina Legal Services.

17 Service Agreement Terms

The term of the Service Agreement shall be effective March 4, 2019 through April 12, 2019.

ATTACHMENT A – DETAILED SCOPE OF SERVICES

Office 365 Basic Software Application Training – SCLS seeks a computer software training company to provide Office 365 software application training services to its employees.

SCLS is standardized on the Microsoft Windows 10 platform for basic end-user applications, currently using Microsoft Office 2013 Professional applications.

Basic Office 365 Applications Training in the following products is required:

- Microsoft Office Word 2016 – Level 1 / Transition from Word 2013
 - Designed for users that are experienced in Microsoft Word 2013 and who are planning to upgrade to Word 2016. Trainer will identify and demonstrate the use of new and enhanced features.
- Microsoft Office Outlook 2016 – Level 1 / Transition from Outlook 2013
 - Designed for users that are experienced in Microsoft Outlook 2013 and who are planning to upgrade to Outlook 2016. Trainer will identify and demonstrate the use of new and enhanced features.
- Microsoft Office Excel 2016 – Level 1 / Transition from Excel 2013
 - Designed for users that are experienced in Microsoft Excel 2013 and who are planning to upgrade to Excel 2016. Trainer will identify and demonstrate the use of new and enhanced features.
- Microsoft Office 365 –End User / Basic Office Web Apps (collaborative cloud extension of local Microsoft Office 2016)
 - *Getting Started*
 - *Collaborating with Shared Files*
 - *Using the Outlook Web App*
 - *Communicating with Microsoft Lync*
 - *Interacting with Mobile Devices*
- Lync Instant Messaging
- Skype for Business Online (online meetings)
- SharePoint Online Site User: (interacting with team sites; working with documents, content, lists & libraries)

The training provider may be asked to provide training on-site at SCLS locations and allow our employees to attend their publicly scheduled sessions - as space permits.

SCLS' Information Technology Manager will evaluate the potential provider's curriculum to identify the elements of training most appropriate for SCLS employees. Training sessions provided off-site at the training provider's facilities should be approximately 6 – 6 ½ hours in length.

It is expected that approximately 115 SCLS employees will participate in these training opportunities. The types and levels of training in each software application will vary depending on employee needs and interest.

0365 Training Scenarios

Scenario – Day 1 (Basic User)	Morning	Afternoon
	MS Word 2016 – Level 1 / Transition from Word 2013	Microsoft Office 365 –End User / Basic Office Web Apps
	MS Excel 2016 – Level 1 / Transition from Excel 2013	<i>Skype for Business Online</i> <i>Lync Instant Messaging</i>
	MS Outlook 2016 – Level 1 / Transition from Outlook 2013	<i>SharePoint Online Site User</i>
Scenario – Day 2 (Super User)	Morning	Afternoon
	MS Word 2016 – Level 2 / Transition from Word 2013	Microsoft Office 365 –End User / Basic Office Web Apps
	MS Excel 2016 – Level 2 / Transition from Excel 2013	<i>Skype for Business Online</i> <i>Lync Instant Messaging</i>
	MS Outlook 2016 – Level 2 / Transition from Outlook 2013	<i>SharePoint Online Site User</i>

ATTACHMENT B – COMPANY REFERENCES

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

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

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