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List View

General Information

[Contact](#) [Default Values](#) [Discount](#) [Document Information](#) [Certification Request](#)

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Legal Name: CASEPOINT LLC

Abstract:

Total Price: \$99.315.00

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continued on page 40

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SANS IOT25112

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Department of Administration
Purchasing Division
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State of West Virginia
Solicitation Response

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CASEPOINT LLC

Solicitation Number: CRFQ 0231 OOT2500000017
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Comments:

FOR INFORMATION CONTACT THE BUYER
Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor		
Signature X	FEIN#	DATE

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Contract Services: e-Discovery System				60313.08

Comm Code	Manufacturer	Specification	Model #
43231511			

Commodity Line Comments:

Extended Description:

Please see the attached Exhibit A Pricing Page
Please note: Vendor must provide Exhibit A Pricing Page with their submitted bid response. Failure to do so will result in disqualification of your bid.



March 6, 2025

Toby L. Welch
West Virginia Department of Administration
Purchasing Division
2019 Washington Street
East Charleston, WV 25305

**RE: West Virginia Office of Technology Cybersecurity e-Discovery Software-as-a-Service CRFQ
OOT2500000017**

Casepoint, LLC ("Casepoint" or "Offeror") is pleased to submit the enclosed Bid Response for CRFQ OOT2500000017, for the purchase of an E-Discovery Software as a Service on behalf of the West Virginia Office of Technology (WVOT). As the incumbent vendor, we have a proven track record of successfully delivering an eDiscovery software platform that supports the state's litigation and Freedom of Information Act (FOIA) needs and is committed to continuing our partnership with the WVOT.

Casepoint is a FedRAMP moderate, end-to-end unified Software-as-a-Service (SaaS) solution with robust eDiscovery capabilities and built-in innovative technology to successfully manage and handle the entire discovery process from legal hold and cloud collections to review, analytics, and productions. Casepoint also provides a secure environment for highly sensitive data, while allowing for a collaborative environment: data is maintained in one place to reduce risks, increase collaborations, and improve defensibility.

As the company point of contact, I have provided my contact information below if you have any questions.

Best,

Chris Kruse
Chief Revenue Officer
Casepoint
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Washington, DC 20036
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**EXHIBIT A – Pricing Page
eDiscovery SaaS - (OT25112)**

Section	Description	Unit of Measure	Estimated Quantity	Unit Cost	Extended Cost
4.1.1	Contract Item #1: Unlimited Concurrent user license for e-discovery SaaS	LS	1.00	Zero Cost	Zero Cost
4.1.2	Contract Item #2: One (1) Gigabyte Data e-Discovery SaaS usage Monthly Charge(data must rounded to the nearest whole gigabyte for billing/ auditing purposes see section 4.1.9)	EA	100.00	\$ 4.00	\$ 400.00
4.1.7	Contract Item #3: Live individualized Agency virtual training session for up to 25 users per session (See specifications section 4.1.7 for further details)	EA	1.00	Zero Cost	Zero Cost
4.1.7.4	Contract Item #4: e-Discovery SaaS access to an online knowledge base or help center.	LS	1.00	Zero Cost	Zero Cost
4.1.7.5	Contract Item #5: Initial Setup and configuration of eDiscovery SaaS	LS	1.00	Zero Cost	Zero Cost
4.1.7.7	Contract Item #6: e-Discovery SaaS Project Management	HR	100.00	\$ 146.60	\$ 14,660.00
4.1.8	Contract Item #7: e-Discovery SaaS Technical Support	HR	100.00	Zero Cost	Zero Cost
4.1.7.6	Contract Item #8: Maintenance and Support Year 1	LS	1.00	Zero Cost	Zero Cost
4.1.1	Optional Renewal Year 2: Contract Item #1: Unlimited Concurrent user license for e-discovery SaaS	LS	1.00	Zero Cost	Zero Cost
4.1.2	Optional Renewal Year 2: Contract Item #2: One (1) Gigabyte Data e-Discovery SaaS usage Monthly Charge(data must rounded to the nearest whole gigabyte for billing/ auditing purposes see section 4.1.9)	EA	100.00	\$ 4.12	\$ 412.00
4.1.7	Optional Renewal Year 2:Contract Item #3: Live individualized Agency virtual training session for up to 25 users per session (See specifications section 4.1.7 for further details)	EA	1.00	Zero Cost	Zero Cost
4.1.7.4	Optional Renewal Year 2: #4: e-Discovery SaaS access to an online knowledge base or help center.	LS	1.00	Zero Cost	Zero Cost
4.1.7.5	Optional Renewal Year 2: Contract Item #5: Initial Setup and configuration of eDiscovery SaaS	LS	1.00	Zero Cost	Zero Cost
4.1.7.7	Optional Renewal Year 2: Contract Item #6: e-Discovery SaaS Project Management	HR	100.00	\$ 146.60	\$ 14,660.00
4.1.8	Optional Renewal Year 2: Contract Item #7: e-Discovery SaaS Technical Support	HR	100.00	Zero Cost	Zero Cost
4.1.7.6	Optional Renewal Year 2: Contract Item #8: Maintenance and Support Year 1	LS	1.00	Zero Cost	Zero Cost
4.1.1	Optional Renewal Year 3: Contract Item #1: Unlimited Concurrent user license for e-discovery SaaS	LS	1.00	Zero Cost	Zero Cost
4.1.2	Optional Renewal Year 3: Contract Item #2: One (1) Gigabyte Data e-Discovery SaaS usage Monthly Charge(data must rounded to the nearest whole gigabyte for billing/ auditing purposes see section 4.1.9)	EA	100.00	\$ 4.24	\$ 424.36
4.1.7	Optional Renewal Year 3:Contract Item #3: Live individualized Agency virtual training session for up to 25 users per session (See specifications section 4.1.7 for further details)	EA	1.00	Zero Cost	Zero Cost
4.1.7.4	Optional Renewal Year 3: #4: e-Discovery SaaS access to an online knowledge base or help center.	LS	1.00	Zero Cost	Zero Cost
4.1.7.5	Optional Renewal Year 3: Contract Item #5: Initial Setup and configuration of eDiscovery SaaS	LS	1.00	Zero Cost	Zero Cost
4.1.7.7	Optional Renewal Year 3: Contract Item #6: e-Discovery SaaS Project Management	HR	100.00	\$ 146.60	\$ 14,660.00
4.1.8	Optional Renewal Year 3: Contract Item #7: e-Discovery SaaS Technical Support	HR	100.00	Zero Cost	Zero Cost
4.1.7.6	Optional Renewal Year 3: Contract Item #8: Maintenance and Support Year 1	LS	1.00	Zero Cost	Zero Cost
4.1.1	Optional Renewal Year 4: Contract Item #1: Unlimited Concurrent user license for e-discovery SaaS	LS	1.00	Zero Cost	Zero Cost
4.1.2	Optional Renewal Year 4: Contract Item #2: One (1) Gigabyte Data e-Discovery SaaS usage Monthly Charge(data must rounded to the nearest whole gigabyte for billing/ auditing purposes see section 4.1.9)	EA	100.00	\$ 4.37	\$ 436.72
4.1.7	Optional Renewal Year 4:Contract Item #3: Live individualized Agency virtual training session for up to 25 users per session (See specifications section 4.1.7 for further details)	EA	1.00	Zero Cost	Zero Cost
4.1.7.4	Optional Renewal Year 4: #4: e-Discovery SaaS access to an online knowledge base or help center.	LS	1.00	Zero Cost	Zero Cost
4.1.7.5	Optional Renewal Year 3: Contract Item #5: Initial Setup and configuration of eDiscovery SaaS	LS	1.00	Zero Cost	Zero Cost
4.1.7.7	Optional Renewal Year 4: Contract Item #6: e-Discovery SaaS Project Management	HR	100.00	\$ 146.60	\$ 14,660.00
4.1.8	Optional Renewal Year 4: Contract Item #7: e-Discovery SaaS Technical Support	HR	100.00	Zero Cost	Zero Cost
4.1.7.6	Optional Renewal Year 4: Contract Item #8: Maintenance and Support Year 1	LS	1.00	Zero Cost	Zero Cost
Total Cost				\$	60,313.08

Contract will be evaluated on all lines but only awarded on first year. Renewal options for years 2, 3, and 4 will be initiated by the Agency, agreed to by the Vendor and processed by the West Virginia Purchasing Division as Change Orders for subsequent years.


Vendor Signature:

March 6, 2025
Date:



Casepoint's Response to West Virginia Office of Technology Cybersecurity e- Discovery Software-as-a- Service CRFQ

March 7, 2025

Company Name: Casepoint, LLC
Address: 1101 17th Street NW, Floor 12
Washington, DC 20036
Website: <http://www.casepoint.com>
Point of Contact: Danielle Gray
Account Manager / Project Manager, Government
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1. The Casepoint Platform's Capabilities for WVOT

Since 2020 Casepoint has supported the West Virginia Office of Technology (WVOT)'s e-Discovery Software-as-a-Service (SaaS) program, successfully transitioning WVOT from manual processes to an end-to-end eDiscovery platform.

Throughout this contract, Casepoint has worked closely with WVOT to provide the customization, user training, scalability, and flexibility to balance increasing eDiscovery needs with fixed budget requirements.

Casepoint's detailed understanding of the WVOT's processes combined with our continued innovation in the Casepoint platform and commitment to user enablement will provide the following key benefits to the eDiscovery SaaS program:

- **Continuity of operations for WVOT:** Casepoint eDiscovery is known and trusted by WVOT users, and they can continue to use existing features while working with our customer success team to leveraging the value of new feature releases and capabilities within Casepoint eDiscovery.
- **Avoid unnecessary risk and invest in the best value proposition:** A technology transition inherently comes with risks to both workflow disruption and budgetary constraints through the cost of data migration, implementation, and investing time in user training on a new solution. With Casepoint, WVOT is assured of continued success and can focus efforts on increasing user efficiency through refining workflows, leveraging new features, and devoting time to advanced user training and enablement.

As WVOT has already experienced, with Casepoint eDiscovery they can continue to:

- **Protect WVOT's data with the most secure eDiscovery solution in the industry:** Casepoint has achieved StateRAMP, FedRAMP Moderate, and FedRAMP High accreditation, and maintains SOC 1 Type II, SOC 2 Type II, SOC 3, and ISO 27001:2022 authorizations, attestations, and certifications.
- **Enhance efficiency with comprehensive AI, analytics, and review capabilities:** Casepoint continues to provide regular product releases with evolving advanced capabilities, analytics, and AI features to enable WVOT to continue modernizing workflows, accelerating data review, and streamlining data ingestion and production.
- **Enable users with dedicated training and support:** Casepoint's Customer Success team is dedicated to continued support of our long-term customers like WVOT. Through regular engagements, Casepoint's Customer Success team will work to identify the most beneficial resources for continuing education, including new feature release seminars, tailored training, and educational resources for users.

The following section highlights Casepoint's continued ability to meet or exceed all of WVOT's requirements.

Why Casepoint?

- Casepoint is known and trusted by WVOT users enabling eDiscovery efficiency since 2020.
- Casepoint meets higher security standards than any other legal eDiscovery software on the market with StateRAMP, FedRAMP, and DOD IL5 and IL6 accreditations.
- Casepoint's Customer Success team will continue to support WVOT users with resources to improve efficiency with new features and capabilities.



2. Response to WVOT's Requirements

Table 1 demonstrates Casepoint's compliance with all technical requirements identified in WVOT's CRFQ.

Table 1. Casepoint's capabilities to fully meet or exceed WVOT's requirements

Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
4.1.1.	General Requirements – e-Discovery System		
4.1.1.1	The Vendor must provide an e-Discovery System that is cloud-based (Software as a Service Model) as well as support Automated Cloud Data Collections and Connectors.	✓ Meets	The Casepoint platform is a cloud-based Software-as-a-Service (SaaS). Casepoint supports automated cloud data collections with API integrations and connectors. Casepoint's cloud collection capabilities provide a quick, secure, and streamlined method for loading data. Casepoint supports direct collections from Microsoft Purview (including Outlook, One Drive, Teams, and SharePoint), Google Drive, Gmail, Google Vault, Dropbox, Box, Slack, and Slack Enterprise. Casepoint continuously adds new connectors to meet customer requirements and can build a custom connector via an available API if required.
4.1.1.2	The system must contain the following capabilities within a single platform that does not require integration with other software: self-service data loading, self-service data processing, client administration, self-service, productions, review, and analytics capabilities.	✓+ Exceeds	Casepoint provides end-to-end eDiscovery capabilities in a single platform. Casepoint supports self-service capabilities enabling users with appropriate permissions to set up workspaces, load data, perform cloud collections, process data with a multitude of processing options, work through exception handling, perform full reviews including the use of our AI-based features like CaseAssist and our various TAR options, full production capabilities, archive/delete and manage data, develop templates to drive workflow, custom reporting, and administrative management (e.g., workspace, organizational, and user management including security rights and permissions).
4.1.1.3	The Vendor must provide an e-Discovery System with unlimited user seats for a minimum of 12 months from date of award.	✓ Meets	Casepoint does not charge for user licenses. Our pricing model is based on total data volume hosted within the platform. We do not charge additional fees for processing, advanced analytics, or productions.
4.1.1.4	The system must allow client administrators to have the ability to setup new users or workspaces and assign roles and permissions to new users.	✓ Meets	Casepoint provides self-service administrative capabilities that enable administrators to manage users in the platform, including designating user roles and access at a granular level. Administrators can add,



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			remove, clone, manage and assign users directly from the platform and at any time for any process.
4.1.1.5	The system must allow a user to have multiple roles and toggle between roles. For example, a client administrator can toggle between user roles to validate user permissions and provide user support.	✓ Meets	Casepoint's user authentication model allows a user to be assigned to multiple roles, and they can easily switch between roles from their user profile for different system activities.
4.1.1.6	The system must not require additional licenses and/or software from third parties.	✓ Meets	Casepoint offers unlimited user licenses and does not require software from third parties. Our pricing model is based total data volume hosted within our system. We do not charge additional fees for processing, advanced analytics, or productions.
4.1.1.7	The system must allow the customer/client administrators the ability to remove/delete documents and create archives from the platform.	✓ Meets	Casepoint allows customer/client administrators with the appropriate permissions to remove/delete documents and create archives from the platform.
4.1.1.8	The system must be accessible to an unlimited number of users and allow access to at least 50 concurrent cases each having at least one million documents without degradation to speed.	✓+ Exceeds	<p>Casepoint is built to be a highly scalable platform. Our SaaS architecture includes server clusters that enable the application to spread jobs across multiple machines, supporting single-threaded functionality and lending our application nicely to horizontal scaling. Given Casepoint's SaaS cloud-based architecture, as usage demands increase and based on the specific need, we can scale either vertically or horizontally to improve the application's performance.</p> <p>Casepoint has demonstrated our ability to scale in our work with the U.S. Securities and Exchange Commission (SEC), currently serving 2,898 active users and processing a monthly average of 40 terabytes (TB) of data with peak productions up to 6 TB in a single day. Casepoint supports a high volume of SEC user unique views with a daily average of 33,894 and a monthly average of 847,345. SEC is averaging over 3,000 data uploads monthly in Casepoint and hosting 31 million documents in a single workspace.</p>
4.1.1.9	The system must be a configurable Platform that allows the administrators to configure applications like request tracking and FOIA requests.	✓ Meets	The Casepoint platform can be easily configured to meet evolving needs, use cases such as request tracking and FOIA, and user personas. Role-based permissions are used to customize, configure, and provide access to views, coding panels, redactions, bulk actions, batches, dashboards, and reports.



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			Users can configure views, search results, folders, coding panels, and redaction sets. Workspace templates can be used to create customized workspaces for users. Casepoint provides both standard and customizable reports to display an overview of datasets, data stores, workspace data, native processing details, user activity and productivity, document review progress, and work product.
4.1.1.10	The system must be built on scalable architecture with a storage capacity of at least two petabytes of data.	✓ Meets	Casepoint's platform is built on a scalable architecture that can easily accommodate two petabytes of data. Our SaaS architecture includes server clusters that enable the application to spread jobs across multiple machines, supporting single-threaded functionality and lending our application nicely to horizontal scaling. Casepoint provides a highly scalable cloud environment that can accommodate growing data volumes over multiple years without impacting performance.
4.1.1.11	The Vendor must provide an e-Discovery System that features the following:		
4.1.1.11.1	A system that has two-factor authentication access.	✓ + Exceeds	Only users with authorized credentials can access Casepoint. Casepoint's security authentication method uses multi-factor authentication (MFA). Users need a username, password, and a 6-digit token received via an approved software token generator via a mobile application on a registered iPhone or Android (e.g., Google Authenticator, Microsoft Authenticator, Yubikey, etc.) or six-digit code received via text or email. In addition to MFA, Casepoint supports single sign-on with Azure AD, ADFS, Generic IDP, and Google SSO via SAML 2.0. Casepoint also supports Google WS-Federation and Okta Integration.
4.1.1.11.2	A system that allows the Agency to have 100% data input automation. The Vendor must not have access to Agency-owned data.	✓ + Exceeds	As a Software-as-a-Service (SaaS) platform, customers load their data into Casepoint's secure SaaS environment. Casepoint personnel do not have access to customer data unless the customer specifically allows individual users from the Casepoint team access to provide support services. Customers have full control over what data they load into the platform and who has access to that data, including control over application users, roles, and permissions extended to the feature and folder level.



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			<p>The Casepoint platform automation features to streamline processes and increase efficiency. These features include:</p> <ul style="list-style-type: none"> • Workspace templates streamline the creation of new matters. Work product, user roles, and functionality can be customized in templates, providing a consistent user experience across matters. • Automation rules are available to perform certain actions based on a user's input, such as coding duplicates and families, requiring coding before advancing to the next record, etc. • Automated reports include dataset reports, data store reports, document set reports, processing reports, productivity reports, progress reports, and work product reports.
4.1.1.11.3	A system that provides 256-bit encryption to the data when at rest and in transit.	✓ Meets	Casepoint encrypts data at rest using AES 256-bit encryption and self-encrypting drives. Casepoint also encrypts data in transit using HTTPS, SFTP, and TLS 1.2.
4.1.1.11.4	A system that scans files for viruses.	✓ Meets	Casepoint has deployed a rigorous threat detection system internally that includes virus and malware detection, removal, and protection. Casepoint has automated our process to look for new virus definitions and malware updates twice daily, and works to deploy it immediately to all the servers and workstations. We run scans multiple times whenever data is ingested into the Casepoint platform, as well as weekly "at rest" malware scans. Casepoint uses two different antivirus and malware protection tools.
4.1.1.11.5	A system that allows for load file import and export.	✓+ Exceeds	<p>Casepoint's fully integrated, intelligent data processing module supports the identification and ingestion of over 600 different file types. Casepoint's intelligent processing module automates the process from file uploads, deNISTing, custodian assignment, deduplication (e.g., globally, within custodian), and exception handling through promotion to an ECA or Review environment. Administrators can create processing templates to pre-select common options for each case type.</p> <p>Users can easily export and/or produce selected documents using the production/export wizard. The production/export wizard guides an administrator through the configuration,</p>



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			quality control, preparation, and validation steps for a production. Users can also create production templates to pre-select common options across cases. Creating templates for productions streamlines workflows for increased productivity. Casepoint's production capabilities include all industry-standard file formats for export, including native, single-page TIFF, multi-page TIFF, PDF, and other formats, as needed, including the ability to endorse documents with customizable Bates schemes. Data can also be exported to any industry-standard load file format. Casepoint supports mixed productions with native files, slip sheets, placeholders, and image files.
4.1.2	Data Loading & Processing – e-Discovery System		
4.1.2.1	The system must allow the Agency to have 100% data input automation.	✓+ Exceeds	<p>The Casepoint platform is designed to be self-service. Casepoint enables WVOT to upload, ingest, and process directly in Casepoint, supporting 100% data input automation.</p> <p>Casepoint's intelligent processing and powerful processing engine quickly and easily processes hundreds of file types, seamlessly promoting documents into a review workflow within the same platform.</p>
4.1.2.2	The system must allow the user to load raw data such as PSTs, zip files, and other ESI for processing.	✓+ Exceeds	<p>Casepoint's intelligent processing capabilities include the ability to process content from a wide variety of containers and file formats, including .zip and .rar files, Microsoft Exchange email (PST/OST), MBOX, PDF portfolios, and standard EDRM Load files.</p> <p>Casepoint provides a variety of ways to collect and ingest files into the platform. Options for loading data include:</p> <ul style="list-style-type: none"> • Uploading data directly into the Casepoint web interface via a browser. • Casepoint's Desktop Client is designed to work with larger data sizes and production sets, including third-party data load files, TIFF images, text files, and native files. • Secure FTP • Directly from cloud-based data repositories such as Microsoft 365, Outlook, OneDrive, Microsoft Teams, SharePoint, Google Drive, Gmail, Google Vault, Box, Dropbox, Slack, and Slack Enterprise. <p>Once ingested, Casepoint's fully integrated Intelligent Processing automatically unpacks, extracts, catalogs, deNISTs, deduplicates, OCRs, performs image conversion and</p>



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			promotion to review, according to the selected processing configuration specifications.
4.1.2.3	The system must allow the client administrator to move data between data stores and conduct early case assessment, including running search terms, and listing and counting file types reports, prior to making the data available to reviewers.	✓+ Exceeds	<p>Casepoint allows administrators with the appropriate permissions to move data between data stores and conduct early case assessment.</p> <p>Casepoint supports a variety of Early Case Assessment (ECA) activities, including culling and advanced analytics to provide visibility into data collections, reduce the noise within a collection, and promote the smallest, most relevant set of data for review. Features include date filtering, deNISTing, de-duping, data visualization, communication graphing, word cloud, email threading, timeline views, near dupes, concept searching, clustering, and multiple technology-assisted review (TAR) workflows.</p>
4.1.2.4	The system must allow the customer to create, save, and upload templates for data processing.	✓+ Exceeds	Because Casepoint is designed to be self-service, administrators can create processing templates to pre-select common options for each case type, and these templates can be used to streamline the data processing workflow.
4.1.2.5	The system must have pre-built utilities to support processing for various files including imaging, loading, and text files.	✓+ Exceeds	The Casepoint platform includes pre-built utilities to support processing for various files including imaging, loading, and text files. Casepoint's intelligent processing module automates the process from file uploads, deNISTing, custodian assignment, deduplication, and exception handling through promotion to an ECA or Review environment. Additionally, Casepoint includes tools designed to assist with common eDiscovery data manipulation tasks such as backup/archive, data import, image processing, load file, and text file.
4.1.2.6	The system must support uploading up to 10 GB of data directly from web-browser via "drag and drop".	✓+ Exceeds	<p>Customers can easily upload raw data directly into Casepoint through simple "drag and drop" functionality in the browser. The Processing Wizard assists with uploading electronic files into Casepoint eDiscovery and guides administrators through file uploads, processing requirements, custodian assignment, deduplication, and promotion to the review environment.</p> <p>For large volumes of data, Casepoint offers the Casepoint Desktop Client for large data uploads, downloads, and other data support tools, which is available for Windows (PC or Mac-based installation of Windows).</p>



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
4.1.2.7	The system must allow loading and processing of a data set that has at least 1 terabyte of documents, data, or ESI, into the review tool.	✓ Meets	Clients can upload large datasets via the Desktop Client. Although uploading raw data using a browser is easy, there are benefits to using the Desktop Client, especially when uploading a high volume of native files (over 10 GB) into a workspace for data processing.
4.1.2.8	The system must support data reduction and culling (De-NIST; custodial and global Deduplication; filtering by Custodian, file type, date; keyword searching) during processing.	✓ Meets	<p>De-duplication and de-NISTing are standard features available in the Casepoint platform. With deduplication, our goal is to remove what's unnecessary so users can focus on meaningful evidence, thereby saving time and decreasing costs. Casepoint creates hash values for all data file types received from a client and compares them against each other. Duplicates are identified and removed. This can be done at either the global or custodian level.</p> <p>The same process is used to de-NIST; Casepoint compares all data file types received against the known file type list from NIST, including their corresponding hash value for each file type, and then removes system files such as executables (*.exe), device drivers (such as a printer driver file), or files that are part of a software installation (i.e., *.dll, *.ini, *.chm).</p> <p>In addition to the hash values, Casepoint's data processing engine also checks the file headers to identify any file that may have been changed.</p>
4.1.2.9	The system must include built-in ESI processing capabilities (extraction of text and metadata, imaging, numbering, OCR, load file creation).	✓ Meets	Casepoint includes built-in ESI processing capabilities. Our proprietary processing engine can extract text and metadata, perform imaging, numbering, Optical Character Recognition (OCR), and create load files. During processing, all basic and extended metadata is extracted and preserved. Casepoint supports converting native documents to images (e.g., TIFF) based on user-defined conversion parameters and provides OCR to extract any available text from image file formats. Casepoint can create industry-standard load files for importing into any litigation support tool.
4.1.2.10	The system must keep emails and families together and locate orphaned documents during processing.	✓ Meets	<p>Casepoint maintains the parent/child relationship when processing documents. Families can be identified within the grid view, and a parent/customer numbering option is available when assigning document ID numbers.</p> <p>Casepoint's advanced email threading streamlines the review process by presenting</p>



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			<p>entire conversation threads, intelligently constructed through a proprietary algorithm analyzing metadata and email content. Users can efficiently review threads by subject or conversation index, with the system highlighting the most inclusive thread.</p> <p>Casepoint's email conversation feature provides two ways to view email conversation threads: Grid view and chart view. Both the grid and chart views display relationships between email messages, attachments, and related messages, assisting reviewers in ease of navigation to related elements.</p> <p>Full email threading capabilities include displaying the string and recipient connection and the ability to identify the top email of an email thread. Email threading also displays a historical trail of emails exchanged between a specific sender and receiver, including any missing emails that may have been deleted or removed. Any deleted or removed messages are designated as missing in the email thread tree.</p>
4.1.2.11	The system must support extraction and processing of files within container files such as zip and rar, and support the processing of files in nested containers or folders.	✓ Meets	One of Casepoint's strengths is our ability to work with a wide variety of digital files and formats, including files within container files such as zip and rar. Casepoint can handle over 600 different file types and formats for processing and online document review to meet various litigation support and eDiscovery needs regardless of whether ESI is provided as individual, container, or archive files.
4.1.2.12	The system must have the ability to ingest, process, and view multiple file types.	✓+ Exceeds	Casepoint supports the identification, ingestion, processing, and review of over 600 different file types.
4.1.2.13	The system must allow for load file import and export.	✓ Meets	Casepoint enables both load file import and export. Casepoint supports the ingestion of industry-standard load files and can receive data from any application with Electronic Data Reference Model (EDRM) standard load files, including data exported from Concordance, Summation, Relativity, and Eclipse. Additionally, Casepoint enables data to be easily exported to any industry-standard load file format, including PDF, PST, and CSV. Casepoint has utilities and converters that allow for the customization and creation of various load file formats.
4.1.2.14	The system must allow the user the ability to create templates	✓+ Exceeds	Casepoint provides wizards that walk users through the creation of templates for data processing, productions, data import, and exports. In addition, users can upload



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
	for processing, production, import, export.		templates to use during data processing. Templates can be saved and shared to streamline data processing and production workflows.
4.1.2.15	The system must be able to securely transfer ESI to the review tool.	✓ Meets	Casepoint supports the highest security standards for the transfer of ESI. Collected data is integrated directly into Casepoint eDiscovery, eliminating the need for users to log in and out of other applications or manually transfer duplicate files. Casepoint maintains document-level audit logs that track when documents were coded and produced and by whom. Additionally, Casepoint uses APIs to directly collect from applications, cloud-based data repositories, collaboration tools, and email databases, ensuring a secure and accurate transfer process.
4.1.3	Review		
4.1.3.1	The system must allow users to review and analyze ESI productions.	✓ Meets	Casepoint allows users to review and analyze ESI productions. Casepoint provides customers with full transparency of the production cycle and data sets produced with dashboard visuals and reporting functions. Full production history is maintained in Casepoint eDiscovery. Each version of the produced document is stored in Casepoint eDiscovery and can be viewed as part of each production. Each version is also cross-referenced against its original document. All productions completed are delivered with a summary of metrics to include (but not limited to) document source, document counts, redacted counts, coding confirmations, branding information (bates and confidentialities), placeholder counts, high page counts, and more.
4.1.3.2	The system must allow users to identify and remove duplicate documents and data.	✓+ Exceeds	Casepoint enables users to easily identify and remove duplicate documents and data. Deduplication and deNISTing are standard features in the Casepoint platform. All ingested files are given a hash value during processing, and deduplication can be performed across or within custodians. Users can deduplicate ingested data at the global or custodian level and can also turn deduplication on or off for a case. Users can also identify textually similar documents via the near dupe feature. Near duplicate assists in grouping documents which can then be batched for review based



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			on the similarity, or used to create new document sets for further analysis.
4.1.3.3	The system must allow users to redact and highlight portions of the document.	✓+ Exceeds	Casepoint's redaction features include full-page redactions, native redactions (spreadsheets only at this time), bulk (auto) redactions based on custom entity identification (e.g. SSN), face redactions, inverse redactions, highlighting, annotations, and these features allow for viewing of underlying content of a redaction. Custom redaction settings enable users with appropriate rights to create a unique redaction setting with a particular fill color, font color, font size, border, etc. Redactions can be made with black or white redaction boxes to the TIFF version of the document and can also include specific text, such as "Attorney-customer Privilege" or "Trade Secret." Redactions are maintained as image coordinates within the database. Casepoint also offers an auto-redact feature to locate specific text and patterns and add redactions. Casepoint leverages the Tesseract library for auto-redaction capabilities. At the time of production, redactions are burned into the production documents, and the document is re-OCRed to confirm that the underlying text is not included in any production.
4.1.3.4	The system must allow users to search, tag, index, and code information and provide advance search features including but not limited to keyword, Boolean, stemming, wildcard, fuzzy, proximity and other search types.	✓+ Exceeds	Casepoint's advanced search features include keyword, Boolean, stemming, wildcard, fuzzy, proximity, and other search types. The platform supports both basic and advanced search functionalities, including literal and stemmed word searches, Boolean, wildcard, fuzzy, and phonic searches, approximate string match searching, concept searching and concept clustering, relevance ranking, and bulk search jobs. Users can build, test, save, and run search queries, and the system provides hit highlighting in text and attachments, allowing users to navigate from hit to hit with persistent highlighting of search terms, words, or phrases throughout the collection.
4.1.3.5	The system must process searches, display documents, and allow users to perform document review with minimal loading times.	✓+ Exceeds	Casepoint processes searches efficiently, displays documents, and allows users to perform document review with minimal loading times. Casepoint uses a batched index design alongside a distributed resource service to search for terms in parallel, ensuring fast search times. Additionally, Casepoint is designed to handle an unlimited number of concurrent users accessing the



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			same case database and documents simultaneously without performance degradation. The platform also provides several enhanced views for quick document review, such as thumbnail view, summary view, timeline view, and pivot view, which facilitate efficient navigation and review of documents.
4.1.3.6	The system must include a file viewer that easily and quickly opens files without needing to install additional applications. Supported files must include: [.docx, .xlsx, .pdf, .jpg, .jpeg, .mov, avi, .rtf, .txt., pub, .pptx]	✓+ Exceeds	Casepoint's custom-built comprehensive file viewer supports WVOT's required file types and allows the user to view a file in the native view, TIFF view, extracted text view (or OCR text), HTML view, original view, and production view versions of each document directly within our web browser. Our native view allows users to view documents in a near-native format without the need for the native application to be installed on a user's machine and enables the user to see hidden data and in-document tracked changes/comments.
4.1.3.7	The system must support searching on tags/codes and metadata.	✓ Meets	Casepoint's search functionality allows users to build search queries based on fielded text searches, tags, and metadata fields such as custodian name, doc date, file extension, file size, and has child (attachment) from the core metadata field group.
4.1.3.8	The system must allow the user the option to assign and self-assign batches for review.	✓ Meets	Casepoint has a batching tool that enables users to assign and self-assign documents for review and track the status of document review. Review batches can be organized by review phase (e.g., review project, sub-project, or batch set). Review batches can be assigned to a review team or an individual. A reviewer can accept a batch and check it out to lock the batch for review. A reviewer can also share a batch or individual files within a batch with another user. Once all documents in a batch have been reviewed, the status of the review batch is automatically updated to complete.
4.1.3.9	The system must provide search engines that support both Elasticsearch and dtSearch indexing and searching options within a single matter.	✓ Meets	The Casepoint platform provides basic and advanced search and filtering with both Elasticsearch and dtSearch search engines with custom indexes. Casepoint's basic search features allow users to quickly and easily search using keywords and Boolean operators, and perform proximity searches in the search bar. Hit highlighting is shown in text and attachments, allowing users to navigate from hit to hit with persistent



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			<p>highlighting of search terms, words, or phrases throughout the collection.</p> <p>Casepoint's Advanced Search provides a hybrid of content (text) search, Field search, and powerful analytics that focus searches to achieve more precise results. With Casepoint's advanced search capabilities, users can build, test, save, and run search queries. Advanced Search includes a variety of options for building searches, such as including the family, e.g., an email (the parent) with attachments (the children) in the search results. Advanced Search supports both literal and stemmed word searches, Boolean, wildcard, fuzzy, and phonic searches, approximate string match searching, concept searching and concept clustering, relevance ranking, and bulk search jobs.</p>
4.1.3.10	The system must allow the user to create workspaces, folders, etc., for customizable document organization.	✓+ Exceeds	Casepoint enables users to create workspaces, folders, and sub-folders for customizable document organization. Users can categorize documents using tools such as tags, folders, and sub-folders, and documents can reside in multiple folders. Additionally, users can configure review and workspace templates, data views, menu options, coding panels, redactions, bulk actions, batches, dashboards, and reports to support specific workflows.
4.1.3.11	The system must provide full administrator rights to the customer, including the ability to assign roles/permissions, create review assignments and/or review batches for reviewers.	✓ Meets	Casepoint provides customers with comprehensive administrative rights, including the ability to assign roles and permissions, create review assignments, and manage review batches for reviewers. Administrators can define user roles at the most granular level, including access to fields, tagging panels, screens, files/documents, menu options, and folders. Casepoint has a batching tool that allows administrators to assign documents for review and track the status of document review. Review batches can be organized by review phase and assigned to a review team or an individual. A reviewer can accept a batch and check it out to lock the batch for review, and the status of the review batch is automatically updated to complete once all documents in a batch have been reviewed.
4.1.3.12	The system must allow for the customization of coding panels.	✓+ Exceeds	Casepoint enables the customization of coding panels. Users can configure coding panels to support specific workflows, including creating templates for review, workspaces,



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			and productions. Role-based permissions are used to customize and configure coding panels.
4.1.4	Advanced Analytics – eDiscovery System		
4.1.4.1	The system must include the following content & context analysis capabilities: topic clustering, email threading, near-duplicate analysis, entities recognition.	✓+ Exceeds	<p>Casepoint includes content and context analysis capabilities for topic clustering, email threading, near-duplicate analysis, and entities recognition. These capabilities include:</p> <ul style="list-style-type: none"> • Topic Clustering: Casepoint's clustering tool enables users to create groups of conceptually similar documents based on four types of clustering: Hierarchical Clustering, Document Clustering, Semantic Clustering, and Similar Clustering. • Email Threading: Casepoint's email threading feature allows users to review and tag emails while reviewing the entire thread at once, displaying relationships between email messages, attachments, and related messages. • Near-Duplicate Analysis: Casepoint identifies duplicate files using unique identifiers (hash values) and provides a 'De-Dupe Report' for detailed information about duplicate documents. Near-duplicate analysis identifies files and emails that are near duplicates of each other. • Entities Recognition: The Entity Recognition process extracts pertinent data regarding important places, organizations, products, people, identity information (e.g., PII), or other common data categories useful for reviewing documents.
4.1.4.2	The system must provide predictive coding, advanced artificial intelligence (AI) and Technology Assisted Review (TAR) technologies including TAR 1.0 and TAR 3.0.	✓ Meets	<p>Casepoint's advanced analytics and artificial intelligence (AI) features to support TAR are woven throughout the platform to provide a quick and powerful way to evaluate relevant data and identify data for pattern recognition, content, context, topics, people/custodians, and more. CaseAssist is Casepoint's artificial intelligence and active learning tool suite. CaseAssist is composed of two tools, CaseAssist Active Learning (CAAL) and CaseAssist Data Stories.</p> <p>CaseAssist Active Learning is simple to use and produces powerful results. CAAL uses continuous active learning based on users' input for responsive/unresponsive data to</p>



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			predict and rank unreviewed documents. CAAL supports full verification, precision, recall, and F-measure reporting.
4.1.4.3	The system must provide Active Learning (story builder with continuous active learning analytics).	✓ Meets	Using a key document or details copied from a client email or document, CaseAssist Data Story Builder will build a data story based on the important people, places, companies, and products from that text. The tool will generate a document outline that will identify key data points and associated documents quickly.
4.1.5	Security – eDiscovery System		
4.1.5.1	The system must provide secure authorized access and have multifactor authentication for each user to prevent unauthorized access.	✓+ Exceeds	Casepoint's security authentication method uses multi-factor authentication (MFA). Users need a username, password, and a 6-digit token received via an approved software token generator via a mobile application on a registered iPhone or Android (e.g., Google Authenticator, Microsoft Authenticator, Yubikey, etc.) or six-digit code received via text or email. In addition to MFA, Casepoint supports single sign-on with Azure AD, ADFS, Generic IDP, and Google SSO via SAML 2.0. Casepoint also supports Google WS-Federation and Okta Integration.
4.1.5.2	The systems must provide automatic session termination if no activity with a prescribed period of time.	✓ Meets	Casepoint hosts are configured to terminate user sessions after 15 minutes of inactivity. Additionally, the Casepoint application is configured to automatically terminate a customer user session upon receiving a logout request from the user or after 15 minutes of inactivity. All systems require re-authentication to reestablish the session.
4.1.5.3	The system must allow a client administrator to restrict security rights at the individual, group or role level.	✓+ Exceeds	Casepoint's user authentication model is governed by role-based security access rights based on case-level security and field-level security. Administrators can define the roles at the most granular level, including access to fields, tagging panels, screens, files/documents, menu options, and folders.
4.1.5.4	The system must provide a security level that allows system administrators to add new users to the system and edit existing user permissions.	✓ Meets	Administrators can manage user roles at the most granular level, including adding or deleting users and configuring access rights to fields, tagging panels, screens, files/documents, menu options, and folders. This ensures precise control over user permissions and access levels within the platform.



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
4.1.5.5	The vendor must provide regular maintenance including new releases and updates.	✓ Meets	Casepoint performs regularly scheduled product updates, including software upgrades, enhancements, and bug fixes as well as back-end hardware and software upgrades, maintenance, and patches..
4.1.5.6	The system must provide at least 256-bit encryption to the data when at rest and in transit.	✓ Meets	Casepoint encrypts data at rest using AES 256-bit encryption and self-encrypting drives. Casepoint also encrypts data in transit using HTTPS, SFTP, and TLS 1.2.
4.1.6	Production – eDiscovery System		
4.1.6.1	The system must provide production of the ESI in a variety of formats including as searchable PDF, native or images and text with a load file.	✓ Meets	Casepoint's production capabilities include all industry standard file formats for export, including native, single-page TIFF, multi-page TIFF, PDF and other formats, as needed. Data can also be exported to any industry standard load file format. Casepoint supports mixed productions with native files, slip sheets, placeholders and image files. Casepoint provides the case team with full transparency of the production cycle and data sets produced with dashboard visuals and reporting functions.
4.1.6.2	The system must have a wizard-driven production process.	✓ Meets	Casepoint eDiscovery provides a step-by-step process for preparing and exporting production sets. The production/export wizard guides the user through the configuration, quality control, preparation, and validation steps for a production.
4.1.6.3	The system must have self-service production capabilities to allow the user to prepare and export from start to finish/download.	✓ Meets	Users can create productions at any time using the production/export wizard, which guides them through the configuration, quality control, preparation, and validation steps. Additionally, users can create production templates to streamline workflows and increase productivity. Productions can be downloaded directly from the web browser or from the Desktop Client.
4.1.6.4	The system must allow the user to view all productions for a single file in the review platform.	✓ Meets	Casepoint allows users to view all productions for a single file in the review platform. Each version of the produced document is stored in Casepoint eDiscovery and can be viewed as part of each production. Each version is also cross-referenced against its original document.
4.1.7	Professional Services and Training - eDiscovery		
4.1.7.1	The vendor must provide live training (which may be virtual)	✓ Meets	Casepoint works closely with our customers to provide them with the necessary training, knowledge, and skills to successfully use Casepoint and manage an electronic discovery case life cycle. Ensuring all



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			<p>administrative and end-users receive the appropriate level and quality of training is fundamental in WVOT's ability to leverage the power of Casepoint.</p> <p>Casepoint will conduct trainings and provide recordings to familiarize WVOT with the Casepoint technology. As matters are launched, project managers will schedule further trainings or new trainings as needed. As the technology evolves, Casepoint offers a series of training opportunities, from new feature release seminars to custom one-on-one training. Those trainings are specifically tailored to how a new feature can impact WVOT's specific needs.</p>
4.1.7.2	The vendor must provide reviewer training and client administrator / organization administrator training.	✓ Meets	<p>Casepoint's training courses include:</p> <ul style="list-style-type: none"> • Reviewer: This training is for users who will perform reviews on Casepoint eDiscovery. Training includes navigating the system, reviewing, coding, redacting, printing, and exporting. Training will also cover basic and advanced searching. • Review Team: For teams using Batch Review Workflow, this training includes accepting and completing batches, coding, redacting, and basic search functionality. • Advanced Reviewer: This training is a step above Reviewer training for those who need more advanced search functionality. Advanced Reviewers will learn how to execute bulk searches, use analytics, bulk code documents, create highlight terms, run bulk redactions, and email threading • Customer Administrator: This training is for the team members responsible for uploading and processing documents within Casepoint eDiscovery and the overall administration of the workspace. This training has seven separate training sessions that total nine hours of training. The sessions cover: Workspace configuration and processing, Data validation and analysis, Web import of processed data, Productions, CAL, Overlays, utilities, and downloads, and Effective data management. Each module can also be taken individually. • Organization Administrator: The Organization Administrator training includes how to add workspaces to the system, add users to the organization,



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			and assign them to workspaces and roles. It also includes how to customize workspaces and add templates.
4.1.7.3	The vendor must record live trainings and provide recorded training to the client at no additional cost.	✓ Meets	Casepoint will provide recordings of WVOT's training sessions. Users also have access to Casepoint Academy for continuing education with recordings of Casepoint Certification courses, onboarding content for new users, and learning paths for specific roles and competencies. Casepoint Academy's training and certification programs are designed to help users grow their skills and maximize their abilities and efficiency in the platform.
4.1.7.4	The system must provide access to a knowledge base or help center, technical documentation, and online support resources.	✓ Meets	Casepoint includes a comprehensive online Knowledge Base that is accessible directly from the platform. The Knowledge Base provides detailed information about all Casepoint features, including step-by-step processes for performing various functions. The Knowledge Base is easy-to-use, searchable, and links users to related capabilities.
4.1.7.5	The vendor must provide support services for the initial setup.	✓ Meets	Casepoint will work with the WVOT administrator to configure Casepoint templates and views to meet WVOT requirements.
4.1.7.6	The vendor must provide support services for the duration of the contract for ongoing maintenance.	✓ Meets	Casepoint provides customer support in accordance with our Service Level Agreement (SLA).
4.1.7.7	The vendor must offer client services support including project management and technical support services.	✓ Meets	Casepoint has a team of experienced eDiscovery specialists and data analysts on stand-by to provide Project Management and Technical Support services. Our team is available to help with various services including user administration, search creation, custom report development, review and production support, workspace configuration, data collection, data migration, and data processing.
4.1.8	Support - eDiscovery		
4.1.8.1	Support by telephone, online, in-app, and email 24 hours-a-day, 7 days-a-week, 365 days-a-year for troubleshooting technical issues.	✓ Meets	Casepoint's Project Management team is available from 8am EST to 6pm EST. Our global support team provides 24/7 technical support.
4.1.8.2	A response time of a minimum of 1 day to request for technical support.	✓ Meets	During regular business hours the Customer Service Team will respond to email requests



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
			<p>sent to mycasepoint@casepoint.com within one hour of request receipt.</p> <p>Outside of normal business hours, the Customer Service Team will respond to requests the next business day at the start of regular business hours.</p> <p>At a minimum, Casepoint will respond within one business day to requests for technical support.</p>
4.1.8.3	Access to knowledge base, technical documentation, and online support resources.	✓ Meets	<p>Casepoint eDiscovery includes a comprehensive online Knowledge Base that is accessible directly from the platform. The Knowledge Base provides detailed information about all Casepoint features, including step-by-step processes for performing various functions. The Knowledge Base is easy-to-use, searchable, and links users to related capabilities.</p> <p>Casepoint Academy is another resource for continuing education, offering Casepoint Certification courses, onboarding content for new users, and learning paths for specific roles and competencies. Casepoint Academy's training and certification programs are designed to help users grow their skills and maximize their abilities and efficiency in the platform.</p>
4.1.9	Billing - eDiscovery		
4.1.9.1	Vendor will round up to the nearest next whole gigabyte (GB) for billing and auditing purposes. (Example 1.2GB will be billed at 2.0 GB)	✓ Meets	Casepoint will round up to the nearest whole GB for billing purposes.
4.1.9.2	Vendor will invoice monthly and will bill at the maximum gigabyte (GB) capacity used by the state.	✓ Meets	Casepoint will provide monthly invoices billed at the maximum GB capacity used.
4.1.9.3	Vendor's proposed solution must provide billing capabilities designed to simplify the procedures of a chargeback model, as well as provide a holistic view of service. The state desires the billing detail to include but not be limited to billing by agency, consumption usage by each agency.	✓ Meets	Casepoint provides monthly invoicing reports that display the volume of data hosted by matter. This is for easier "billing back" to simplify the procedures of a chargeback model.
4.1.10	Software as a Service Addendum		



Section	Requirement	Meets or Exceeds Requirement	Casepoint Response
4.1.10.1	Vendor must sign the attached Software as a Service Addendum prior to award.	✓ Meets	Casepoint agrees to the terms in the Software as a Service Addendum and has provided a signed version with our quote.
4.1.11	Optional Renewals		
4.1.11.1	Vendor will include in their bid the cost of optional Annual renewals for years 2, 3, and 4. These optional Annual renewals will be initiated on Agency request authorized under the authority of the Purchasing Division.	✓ Meets	Casepoint's price quote includes costs for option years 2, 3, and 4.



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Quote
Info Technology

Proc Folder: 1619676			Reason for Modification:
Doc Description: Cybersecurity e-Discovery Software as a Service (OT25112)			
Proc Type: Central Contract - Fixed Amt			Version
Date Issued	Solicitation Closes	Solicitation No	
2025-02-06	2025-02-26 13:30	CRFQ 0231 OOT2500000017	1

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VS0000020805
Vendor Name : Casepoint, LLC
Address : 1101 17th Street NW, Floor 12
Street :
City : Washington
State : DC **Country :** United States **Zip :** 20036
Principal Contact : Chris Kruse, Chief Revenue Officer
Vendor Contact Phone: 415-786-9471 **Extension:**

FOR INFORMATION CONTACT THE BUYER

Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor
Signature X

FEIN# 30-050-3533

DATE March 5, 2025

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

The West Virginia Purchasing Division is soliciting bids on behalf of West Virginia Office of Technology to establish a contract for an e-Discovery software as a service. This software will be used for discovery in legal proceedings to process emails and other files. The software will facilitate keyword searching, document review, privilege report creation, data tagging and redaction prior to final report being released per the terms and conditions and specifications as attached.

INVOICE TO		SHIP TO	
DEPARTMENT OF ADMINISTRATION OFFICE OF TECHNOLOGY 1900 KANAWHA BLVD E, BLDG 5 10TH FLOOR CHARLESTON WV US		WV OFFICE OF TECHNOLOGY BLDG 5, 10TH FLOOR 1900 KANAWHA BLVD E CHARLESTON WV US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Contract Services: e-Discovery System				

Comm Code	Manufacturer	Specification	Model #
43231511			

Extended Description:

Please see the attached Exhibit A Pricing Page

Please note: Vendor must provide Exhibit A Pricing Page with their submitted bid response. Failure to do so will result in disqualification of your bid.

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Questions are due by 3:00 p.m.	2025-02-18

	Document Phase	Document Description	Page 3
OOT2500000017	Draft	Cybersecurity e-Discovery Software as a Service (OT25112)	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

INSTRUCTIONS TO VENDORS SUBMITTING BIDS

1. REVIEW DOCUMENTS THOROUGHLY: The attached documents contain a solicitation for bids. Please read these instructions and all documents attached in their entirety. These instructions provide critical information about requirements that if overlooked could lead to disqualification of a Vendor's bid. All bids must be submitted in accordance with the provisions contained in these instructions and the Solicitation. Failure to do so may result in disqualification of Vendor's bid.

2. MANDATORY TERMS: The Solicitation may contain **mandatory** provisions identified by the use of the words "**must**," "**will**," and "**shall**." Failure to comply with a mandatory term in the Solicitation will result in bid disqualification.

3. PRE-BID MEETING: The item identified below shall apply to this Solicitation.

☒ A pre-bid meeting will not be held prior to bid opening

☐ A **MANDATORY PRE-BID** meeting will be held at the following place and time:

All Vendors submitting a bid must attend the **mandatory** pre-bid meeting. Failure to attend the **mandatory** pre-bid meeting shall result in disqualification of the Vendor's bid. No one individual is permitted to represent more than one vendor at the pre-bid meeting. Any individual that does attempt to represent two or more vendors will be required to select one vendor to which the individual's attendance will be attributed. The vendors not selected will be deemed to have not attended the pre-bid meeting unless another individual attended on their behalf.

An attendance sheet provided at the pre-bid meeting shall serve as the official document verifying attendance. Any person attending the pre-bid meeting on behalf of a Vendor must list on the attendance sheet his or her name and the name of the Vendor he or she is representing. It is the Vendor's responsibility to locate the attendance sheet and provide the required information. Failure to complete the attendance sheet as required may result in disqualification of Vendor's bid.

Vendors who arrive after the starting time but prior to the end of the pre-bid will be permitted to sign in but are charged with knowing all matters discussed at the pre-bid.

Any discussions or answers to questions at the pre-bid meeting are preliminary in nature and are non-binding. Official and binding answers to questions will be published in a written addendum to the Solicitation prior to bid opening.

4. VENDOR QUESTION DEADLINE: Vendors may submit questions relating to this Solicitation to the Purchasing Division. Questions must be submitted in writing. All questions **must be submitted on or before the date listed below and to the address listed below to be considered.** A written response will be published in a Solicitation addendum if a response is possible and appropriate. Non-written discussions, conversations, or questions and answers regarding this Solicitation are preliminary in nature and are non-binding.

Submitted emails should have the solicitation number in the subject line. Question

Submission Deadline: Tuesday February 18, 2025 @3:00 p.m

Submit Questions to: Toby L Welch
2019 Washington Street, East Charleston, WV 25305
Fax: (304) 558-3970
Email: Toby.L.Welch@wv.gov

5. VERBAL COMMUNICATION: Any verbal communication between the Vendor and any State personnel is not binding, including verbal communication at the mandatory pre-bid conference. Only information issued in writing and added to the Solicitation by an official written addendum by the Purchasing Division is binding.

6. BID SUBMISSION: All bids must be submitted on or before the date and time of the bid opening listed in section 7 below. Vendors can submit bids electronically through wvOASIS, in paper form delivered to the Purchasing Division at the address listed below either in person or by courier, or in facsimile form by faxing to the Purchasing Division at the number listed below. Notwithstanding the foregoing, the Purchasing Division may prohibit the submission of bids electronically through wvOASIS at its sole discretion. Such a prohibition will be contained and communicated in the wvOASIS system resulting in the Vendor's inability to submit bids through wvOASIS. The Purchasing Division will not accept bids or modification of bids via email.

Bids submitted in paper, facsimile, or via wvOASIS must contain a signature. Failure to submit a bid in any form without a signature will result in rejection of your bid.

A bid submitted in paper or facsimile form should contain the information listed below on the face of the submission envelope or fax cover sheet. Otherwise, the bid may be rejected by the Purchasing Division.

VENDOR NAME:

BUYER: Toby L Welch

SOLICITATION NO.: CRFQ OOT2500000017

BID OPENING DATE: Wednesday February 26, 2025

BID OPENING TIME: 1:30 p.m.

FAX NUMBER: 304-558-3970

Any bid received by the Purchasing Division staff is considered to be in the possession of the Purchasing Division and will not be returned for any reason.

Bid Delivery Address and Fax Number:

Department of Administration, Purchasing Division 2019 Washington Street East

Charleston, WV 25305-0130

Fax: 304-558-3970

7. BID OPENING: Bids submitted in response to this Solicitation will be opened at the location identified below on the date and time listed below. Delivery of a bid after the bid opening date and time will result in bid disqualification. For purposes of this Solicitation, a bid is considered delivered when confirmation of delivery is provided by wvOASIS (in the case of electronic submission) or when the bid is time stamped by the official Purchasing Division time clock (in the case of hand delivery or via delivery by mail).

Bid Opening Date and Time: 02/26/25 @ 1:30 p.m.

Bid Opening Location:

Department of Administration, Purchasing Division

2019 Washington Street East

Charleston, WV 25305-0130

8. ADDENDUM ACKNOWLEDGEMENT: Changes or revisions to this Solicitation will be made by an official written addendum issued by the Purchasing Division. Vendor should acknowledge receipt of all addenda issued with this Solicitation by completing an Addendum Acknowledgement Form. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

9. BID FORMATTING: Vendor should type or electronically enter the information onto its bid to prevent errors in the evaluation. Failure to type or electronically enter the information may result in bid disqualification.

10. ALTERNATE MODEL OR BRAND: Unless the box below is checked, any model, brand, or specification listed in this Solicitation establishes the acceptable level of quality only and is not intended to reflect a preference for, or in any way favor, a particular brand or vendor. Vendors may bid alternates to a listed model or brand provided that the alternate is at least equal to the model or brand and complies with the required specifications. The equality of any alternate being bid shall be determined by the State at its sole discretion. Any Vendor bidding an alternate model or brand **shall** clearly identify the alternate items in its bid and should include manufacturer's specifications, industry literature, and/or any other relevant documentation demonstrating the equality of the alternate items. Failure to provide information for alternate items **may** be grounds for rejection of a Vendor's bid.

☐ This Solicitation is based upon a standardized commodity established under W. Va. Code § 5A-3-61. Vendors are expected to bid the standardized commodity identified. Failure to bid the standardized commodity will result in your firm's bid being rejected.

11. COMMUNICATION LIMITATIONS: In accordance with West Virginia Code of State Rules §148-1-6.6.2, communication with the State of West Virginia or any of its employees regarding this Solicitation during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited without prior Purchasing Division approval. Purchasing Division approval for such communication is implied for all agency delegated and exempt purchases.

12. REGISTRATION: Prior to Contract award, the apparent successful Vendor **must** be properly registered with the West Virginia Purchasing Division and must have paid the \$125 fee, if applicable.

13. UNIT PRICE: Unit prices **shall** prevail in cases of a discrepancy in the Vendor's bid.

14. PREFERENCE: Vendor Preference may be requested in purchases of motor vehicles or construction and maintenance equipment and machinery used in highway and other infrastructure projects. Any request for preference must be submitted in writing with the bid, must specifically identify the preference requested with reference to the applicable subsection of West Virginia Code § 5A-3-37, and must include with the bid any information necessary to evaluate and confirm the applicability of the requested preference. A request form to help facilitate the request can be found at: www.state.wv.us/admin/purchase/vrc/Venpref.pdf.

15A. RECIPROCAL PREFERENCE: The State of West Virginia applies a reciprocal preference to all solicitations for commodities and printing in accordance with W. Va. Code § 5A-3-37(b). In effect, non-resident vendors receiving a preference in their home states, will see that same preference granted to West Virginia resident vendors bidding against them in West Virginia. Any request for reciprocal preference must include with the bid any information necessary to evaluate and confirm the applicability of the preference. A request form to help facilitate the request can be found at: www.state.wv.us/admin/purchase/vrc/Venpref.pdf.

15. SMALL, WOMEN-OWNED, OR MINORITY-OWNED BUSINESSES:

For any solicitations publicly advertised for bid, in accordance with West Virginia Code § 5A-3-37 and W. Va. CSR § 148-22-9, any non-resident vendor certified as a small, women-owned, or minority-owned business under W. Va. CSR § 148-22-9 shall be provided the same preference made available to any resident vendor. Any non-resident small, women-owned, or minority-owned business must identify itself as such in writing, must submit that writing to the Purchasing Division with its bid, and must be properly certified under W. Va. CSR § 148-22-9 prior to contract award to receive the preferences made available to resident vendors.

16. WAIVER OF MINOR IRREGULARITIES: The Director reserves the right to waive minor irregularities in bids or specifications in accordance with West Virginia Code of State Rules § 148-1-4.7.

17. ELECTRONIC FILE ACCESS RESTRICTIONS: Vendor must ensure that its submission in wvOASIS can be accessed and viewed by the Purchasing Division staff immediately upon bid opening. The Purchasing Division will consider any file that cannot be immediately accessed and viewed at the time of the bid opening (such as, encrypted files, password protected files, or incompatible files) to be blank or incomplete as context requires and are therefore unacceptable. A vendor will not be permitted to unencrypt files, remove password protections, or resubmit documents after bid opening to make a file viewable if those documents are required with the bid. A Vendor may be required to provide document passwords or remove access restrictions to allow the Purchasing Division to print or electronically save documents provided that those documents are viewable by the Purchasing Division prior to obtaining the password or removing the access restriction.

18. NON-RESPONSIBLE: The Purchasing Division Director reserves the right to reject the bid of any vendor as Non-Responsible in accordance with W. Va. Code of State Rules § 148-1-5.3, when the Director determines that the vendor submitting the bid does not have the capability to fully perform or lacks the integrity and reliability to assure good-faith performance.”

19. ACCEPTANCE/REJECTION: The State may accept or reject any bid in whole, or in part in accordance with W. Va. Code of State Rules § 148-1-4.6. and § 148-1-6.3.”

20. WITH THE BID REQUIREMENTS: In instances where these specifications require documentation or other information with the bid, and a vendor fails to provide it with the bid, the Director of the Purchasing Division reserves the right to request those items after bid opening and prior to contract award pursuant to the authority to waive minor irregularities in bids or specifications under W. Va. CSR § 148-1-4.7. This authority does not apply to instances where state law mandates receipt with the bid.

21. EMAIL NOTIFICATION OF AWARD: The Purchasing Division will attempt to provide bidders with e-mail notification of contract award when a solicitation that the bidder participated in has been awarded. For notification purposes, bidders must provide the Purchasing Division with a valid email address in the bid response. Bidders may also monitor *wv*OASIS or the Purchasing Division's website to determine when a contract has been awarded.

22. EXCEPTIONS AND CLARIFICATIONS: The Solicitation contains the specifications that **shall** form the basis of a contractual agreement. **Vendor shall clearly mark any exceptions, clarifications, or other proposed modifications in its bid.** Exceptions to, clarifications of, or modifications of a requirement or term and condition of the Solicitation may result in bid disqualification.

GENERAL TERMS AND CONDITIONS:

1. CONTRACTUAL AGREEMENT: Issuance of an Award Document signed by the Purchasing Division Director, or his designee, and approved as to form by the Attorney General's office constitutes acceptance by the State of this Contract made by and between the State of West Virginia and the Vendor. Vendor's signature on its bid, or on the Contract if the Contract is not the result of a bid solicitation, signifies Vendor's agreement to be bound by and accept the terms and conditions contained in this Contract.

2. DEFINITIONS: As used in this Solicitation/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications included with this Solicitation/Contract.

2.1. "Agency" or "Agencies" means the agency, board, commission, or other entity of the State of West Virginia that is identified on the first page of the Solicitation or any other public entity seeking to procure goods or services under this Contract.

2.2. "Bid" or "Proposal" means the vendors submitted response to this solicitation.

2.3. "Contract" means the binding agreement that is entered into between the State and the Vendor to provide the goods or services requested in the Solicitation.

2.4. "Director" means the Director of the West Virginia Department of Administration, Purchasing Division.

2.5. "Purchasing Division" means the West Virginia Department of Administration, Purchasing Division.

2.6. "Award Document" means the document signed by the Agency and the Purchasing Division, and approved as to form by the Attorney General, that identifies the Vendor as the contract holder.

2.7. "Solicitation" means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

2.8. "State" means the State of West Virginia and/or any of its agencies, commissions, boards, etc. as context requires.

2.9. "Vendor" or "Vendors" means any entity submitting a bid in response to the Solicitation, the entity that has been selected as the lowest responsible bidder, or the entity that has been awarded the Contract as context requires.

3. CONTRACT TERM; RENEWAL; EXTENSION: The term of this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below:

☒ **Term Contract**

Initial Contract Term: The Initial Contract Term will be for a period of One (1) Year. The Initial Contract Term becomes effective on the effective start date listed on the first page of this Contract, identified as the State of West Virginia contract cover page containing the signatures of the Purchasing Division, Attorney General, and Encumbrance clerk (or another page identified as _____), and the Initial Contract Term ends on the effective end date also shown on the first page of this Contract.

Renewal Term: This Contract may be renewed upon the mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only). Any request for renewal should be delivered to the Agency and then submitted to the Purchasing Division thirty (30) days prior to the expiration date of the initial contract term or appropriate renewal term. A Contract renewal shall be in accordance with the terms and conditions of the original contract. Unless otherwise specified below, renewal of this Contract is limited to Three (3) successive one (1) year periods or multiple renewal periods of less than one year, provided that the multiple renewal periods do not exceed the total number of months available in all renewal years combined. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's office (Attorney General approval is as to form only)

☐ **Alternate Renewal Term** – This contract may be renewed for _____ successive _____ year periods or shorter periods provided that they do not exceed the total number of months contained in all available renewals. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's office (Attorney General approval is as to form only)

Delivery Order Limitations: In the event that this contract permits delivery orders, a delivery order may only be issued during the time this Contract is in effect. Any delivery order issued within one year of the expiration of this Contract shall be effective for one year from the date the delivery order is issued. No delivery order may be extended beyond one year after this Contract has expired.

☐ **Fixed Period Contract:** This Contract becomes effective upon Vendor's receipt of the notice to proceed and must be completed within _____ days.

☐ **Fixed Period Contract with Renewals:** This Contract becomes effective upon Vendor's receipt of the notice to proceed and part of the Contract more fully described in the attached specifications must be completed within _____ days. Upon completion of the work covered by the preceding sentence, the vendor agrees that:

☐ the contract will continue for _____ years;

☐ the contract may be renewed for _____ successive _____ year periods or shorter periods provided that they do not exceed the total number of months contained in all available renewals. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's Office (Attorney General approval is as to form only).

☐ **One-Time Purchase:** The term of this Contract shall run from the issuance of the Award Document until all of the goods contracted for have been delivered, but in no event will this Contract extend for more than one fiscal year.

☐ **Construction/Project Oversight:** This Contract becomes effective on the effective start date listed on the first page of this Contract, identified as the State of West Virginia contract cover page containing the signatures of the Purchasing Division, Attorney General, and Encumbrance clerk (or another page identified as _____), and continues until the project for which the vendor is providing oversight is complete.

☐ **Other:** Contract Term specified in _____

4. AUTHORITY TO PROCEED: Vendor is authorized to begin performance of this contract on the date of encumbrance listed on the front page of the Award Document unless either the box for "Fixed Period Contract" or "Fixed Period Contract with Renewals" has been checked in Section 3 above. If either "Fixed Period Contract" or "Fixed Period Contract with Renewals" has been checked, Vendor must not begin work until it receives a separate notice to proceed from the State. The notice to proceed will then be incorporated into the Contract via change order to memorialize the official date that work commenced.

5. QUANTITIES: The quantities required under this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below.

☒ **Open End Contract:** Quantities listed in this Solicitation/Award Document are approximations only, based on estimates supplied by the Agency. It is understood and agreed that the Contract shall cover the quantities actually ordered for delivery during the term of the Contract, whether more or less than the quantities shown.

☐ **Service:** The scope of the service to be provided will be more clearly defined in the specifications included herewith.

☐ **Combined Service and Goods:** The scope of the service and deliverable goods to be provided will be more clearly defined in the specifications included herewith.

☐ **One-Time Purchase:** This Contract is for the purchase of a set quantity of goods that are identified in the specifications included herewith. Once those items have been delivered, no additional goods may be procured under this Contract without an appropriate change order approved by the Vendor, Agency, Purchasing Division, and Attorney General's office.

☐ **Construction:** This Contract is for construction activity more fully defined in the specifications.

6. EMERGENCY PURCHASES: The Purchasing Division Director may authorize the Agency to purchase goods or services in the open market that Vendor would otherwise provide under this Contract if those goods or services are for immediate or expedited delivery in an emergency. Emergencies shall include, but are not limited to, delays in transportation or an unanticipated increase in the volume of work. An emergency purchase in the open market, approved by the Purchasing Division Director, shall not constitute of breach of this Contract and shall not entitle the Vendor to any form of compensation or damages. This provision does not excuse the State from fulfilling its obligations under a One-Time Purchase contract.

7. REQUIRED DOCUMENTS: All of the items checked in this section must be provided to the Purchasing Division by the Vendor as specified:

☒ **LICENSE(S) / CERTIFICATIONS / PERMITS:** In addition to anything required under the Section of the General Terms and Conditions entitled Licensing, the apparent successful Vendor shall furnish proof of the following licenses, certifications, and/or permits upon request and in a form acceptable to the State. The request may be prior to or after contract award at the State's sole discretion.

WV Software as a Service Addendum Attached as Appendix A. See specification 4.1.10



The apparent successful Vendor shall also furnish proof of any additional licenses or certifications contained in the specifications regardless of whether or not that requirement is listed above.

8. INSURANCE: The apparent successful Vendor shall furnish proof of the insurance identified by a checkmark below prior to Contract award. The insurance coverages identified below must be maintained throughout the life of this contract. Thirty (30) days prior to the expiration of the insurance policies, Vendor shall provide the Agency with proof that the insurance mandated herein has been continued. Vendor must also provide Agency with immediate notice of any changes in its insurance policies, including but not limited to, policy cancelation, policy reduction, or change in insurers. The apparent successful Vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award regardless of whether that insurance requirement is listed in this section.

Vendor must maintain:

☒ **Commercial General Liability Insurance** in at least an amount of: \$1,000,000.00 per occurrence.

☐ **Automobile Liability Insurance** in at least an amount of: _____ per occurrence.

☐ **Professional/Malpractice/Errors and Omission Insurance** in at least an amount of: _____ per occurrence. Notwithstanding the forgoing, Vendor's are not required to list the State as an additional insured for this type of policy.

☐ **Commercial Crime and Third Party Fidelity Insurance** in an amount of: _____ per occurrence.

☒ **Cyber Liability Insurance** in an amount of: \$1,000,000.00 per occurrence.

☐ **Builders Risk Insurance** in an amount equal to 100% of the amount of the Contract.

☐ **Pollution Insurance** in an amount of: _____ per occurrence.

☐ **Aircraft Liability** in an amount of: _____ per occurrence.

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9. WORKERS' COMPENSATION INSURANCE: Vendor shall comply with laws relating to workers compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request.

10. VENUE: All legal actions for damages brought by Vendor against the State shall be brought in the West Virginia Claims Commission. Other causes of action must be brought in the West Virginia court authorized by statute to exercise jurisdiction over it.

11. LIQUIDATED DAMAGES: This clause shall in no way be considered exclusive and shall not limit the State or Agency's right to pursue any other available remedy. Vendor shall pay liquidated damages in the amount specified below or as described in the specifications:

☐ _____ for _____.

☐ Liquidated Damages Contained in the Specifications.

☒ Liquidated Damages Are Not Included in this Contract.

12. ACCEPTANCE: Vendor's signature on its bid, or on the certification and signature page, constitutes an offer to the State that cannot be unilaterally withdrawn, signifies that the product or service proposed by vendor meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise indicated, and signifies acceptance of the terms and conditions contained in the Solicitation unless otherwise indicated.

13. PRICING: The pricing set forth herein is firm for the life of the Contract, unless specified elsewhere within this Solicitation/Contract by the State. A Vendor's inclusion of price adjustment provisions in its bid, without an express authorization from the State in the Solicitation to do so, may result in bid disqualification. Notwithstanding the foregoing, Vendor must extend any publicly advertised sale price to the State and invoice at the lower of the contract price or the publicly advertised sale price.

14. PAYMENT IN ARREARS: Payments for goods/services will be made in arrears only upon receipt of a proper invoice, detailing the goods/services provided or receipt of the goods/services, whichever is later. Notwithstanding the foregoing, payments for software maintenance, licenses, or subscriptions may be paid annually in advance.

15. PAYMENT METHODS: Vendor must accept payment by electronic funds transfer and P-Card. (The State of West Virginia's Purchasing Card program, administered under contract by a banking institution, processes payment for goods and services through state designated credit cards.)

16. TAXES: The Vendor shall pay any applicable sales, use, personal property or any other taxes arising out of this Contract and the transactions contemplated thereby. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.

17. ADDITIONAL FEES: Vendor is not permitted to charge additional fees or assess additional charges that were not either expressly provided for in the solicitation published by the State of West Virginia, included in the Contract, or included in the unit price or lump sum bid amount that Vendor is required by the solicitation to provide. Including such fees or charges as notes to the solicitation may result in rejection of vendor's bid. Requesting such fees or charges be paid after the contract has been awarded may result in cancellation of the contract.

18. FUNDING: This Contract shall continue for the term stated herein, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise made available, this Contract becomes void and of no effect beginning on July 1 of the fiscal year for which funding has not been appropriated or otherwise made available. If that occurs, the State may notify the Vendor that an alternative source of funding has been obtained and thereby avoid the automatic termination. Non-appropriation or non-funding shall not be considered an event of default.

19. CANCELLATION: The Purchasing Division Director reserves the right to cancel this Contract immediately upon written notice to the vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract. The Purchasing Division Director may also cancel any purchase or Contract upon 30 days written notice to the Vendor in accordance with West Virginia Code of State Rules § 148-1-5.2.b.

20. TIME: Time is of the essence regarding all matters of time and performance in this Contract.

21. APPLICABLE LAW: This Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution, West Virginia Code, or West Virginia Code of State Rules is void and of no effect.

22. COMPLIANCE WITH LAWS: Vendor shall comply with all applicable federal, state, and local laws, regulations and ordinances. By submitting a bid, Vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to comply with all applicable laws, regulations, and ordinances. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

23. ARBITRATION: Any references made to arbitration contained in this Contract, Vendor's bid, or in any American Institute of Architects documents pertaining to this Contract are hereby deleted, void, and of no effect.

24. MODIFICATIONS: This writing is the parties' final expression of intent. Notwithstanding anything contained in this Contract to the contrary no modification of this Contract shall be binding without mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only). Any change to existing contracts that adds work or changes contract cost, and were not included in the original contract, must be approved by the Purchasing Division and the Attorney General's Office (as to form) prior to the implementation of the change or commencement of work affected by the change.

25. WAIVER: The failure of either party to insist upon a strict performance of any of the terms or provision of this Contract, or to exercise any option, right, or remedy herein contained, shall not be construed as a waiver or a relinquishment for the future of such term, provision, option, right, or remedy, but the same shall continue in full force and effect. Any waiver must be expressly stated in writing and signed by the waiving party.

26. SUBSEQUENT FORMS: The terms and conditions contained in this Contract shall supersede any and all subsequent terms and conditions which may appear on any form documents submitted by Vendor to the Agency or Purchasing Division such as price lists, order forms, invoices, sales agreements, or maintenance agreements, and includes internet websites or other electronic documents. Acceptance or use of Vendor's forms does not constitute acceptance of the terms and conditions contained thereon.

27. ASSIGNMENT: Neither this Contract nor any monies due, or to become due hereunder, may be assigned by the Vendor without the express written consent of the Agency, the Purchasing Division, the Attorney General's office (as to form only), and any other government agency or office that may be required to approve such assignments.

28. WARRANTY: The Vendor expressly warrants that the goods and/or services covered by this Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the Agency; (b) be merchantable and fit for the purpose intended; and (c) be free from defect in material and workmanship.

29. STATE EMPLOYEES: State employees are not permitted to utilize this Contract for personal use and the Vendor is prohibited from permitting or facilitating the same.

30. PRIVACY, SECURITY, AND CONFIDENTIALITY: The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the Agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the Agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in www.state.wv.us/admin/purchase/privacy.

31. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., 5-22-1 et seq., and 5G-1-1 et seq. and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Purchasing Division constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The Purchasing Division will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

32. LICENSING: In accordance with West Virginia Code of State Rules § 148-1-6.1.e, Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agency or political subdivision. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Upon request, the Vendor must provide all necessary releases to obtain information to enable the Purchasing Division Director or the Agency to verify that the Vendor is licensed and in good standing with the above entities.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to be licensed, in good standing, and up-to-date on all state and local obligations as described in this section. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

33. ANTITRUST: In submitting a bid to, signing a contract with, or accepting a Award Document from any agency of the State of West Virginia, the Vendor agrees to convey, sell, assign, or transfer to the State of West Virginia all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to Vendor.

34. VENDOR NON-CONFLICT: Neither Vendor nor its representatives are permitted to have any interest, nor shall they acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the Agency.

35. VENDOR RELATIONSHIP: The relationship of the Vendor to the State shall be that of an independent contractor and no principal-agent relationship or employer-employee relationship is contemplated or created by this Contract. The Vendor as an independent contractor is solely liable for the acts and omissions of its employees and agents. Vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this Solicitation and resulting contract. Neither the Vendor, nor any employees or subcontractors of the Vendor, shall be deemed to be employees of the State for any purpose whatsoever. Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing.

Vendor shall hold harmless the State, and shall provide the State and Agency with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

36. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the Agency, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.

37. NO DEBT CERTIFICATION: In accordance with West Virginia Code §§ 5A-3-10a and 5-22-1(i), the State is prohibited from awarding a contract to any bidder that owes a debt to the State or a political subdivision of the State. By submitting a bid, or entering into a contract with the State, Vendor is affirming that (1) for construction contracts, the Vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, neither the Vendor nor any related party owe a debt as defined above, and neither the Vendor nor any related party are in employer default as defined in the statute cited above unless the debt or employer default is permitted under the statute.

38. CONFLICT OF INTEREST: Vendor, its officers or members or employees, shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. Vendor shall periodically inquire of its officers, members and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to the Agency.

39. REPORTS: Vendor shall provide the Agency and/or the Purchasing Division with the following reports identified by a checked box below:

☒ Such reports as the Agency and/or the Purchasing Division may request. Requested reports may include, but are not limited to, quantities purchased, agencies utilizing the contract, total contract expenditures by agency, etc.

☐ Quarterly reports detailing the total quantity of purchases in units and dollars, along with a listing of purchases by agency. Quarterly reports should be delivered to the Purchasing Division via email at purchasing.division@wv.gov.

40. BACKGROUND CHECK: In accordance with W. Va. Code § 15-2D-3, the State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at the Capitol complex based upon results addressed from a criminal background check. Service providers should contact the West Virginia Division of Protective Services by phone at (304) 558-9911 for more information.

41. PREFERENCE FOR USE OF DOMESTIC STEEL PRODUCTS: Except when authorized by the Director of the Purchasing Division pursuant to W. Va. Code § 5A-3-56, no contractor may use or supply steel products for a State Contract Project other than those steel products made in the United States. A contractor who uses steel products in violation of this section may be subject to civil penalties pursuant to W. Va. Code § 5A-3-56. As used in this section:

- a. "State Contract Project" means any erection or construction of, or any addition to, alteration of or other improvement to any building or structure, including, but not limited to, roads or highways, or the installation of any heating or cooling or ventilating plants or other equipment, or the supply of and materials for such projects, pursuant to a contract with the State of West Virginia for which bids were solicited on or after June 6, 2001.
- b. "Steel Products" means products rolled, formed, shaped, drawn, extruded, forged, cast, fabricated or otherwise similarly processed, or processed by a combination of two or more or such operations, from steel made by the open hearth, basic oxygen, electric furnace, Bessemer or other steel making process.
- c. The Purchasing Division Director may, in writing, authorize the use of foreign steel products if:
 1. The cost for each contract item used does not exceed one tenth of one percent (.1%) of the total contract cost or two thousand five hundred dollars (\$2,500.00), whichever is greater. For the purposes of this section, the cost is the value of the steel product as delivered to the project; or
 2. The Director of the Purchasing Division determines that specified steel materials are not produced in the United States in sufficient quantity or otherwise are not reasonably available to meet contract requirements.

42. PREFERENCE FOR USE OF DOMESTIC ALUMINUM, GLASS, AND STEEL: In Accordance with W. Va. Code § 5-19-1 et seq., and W. Va. CSR § 148-10-1 et seq., for every contract or subcontract, subject to the limitations contained herein, for the construction, reconstruction, alteration, repair, improvement or maintenance of public works or for the purchase of any item of machinery or equipment to be used at sites of public works, only domestic aluminum, glass or steel products shall be supplied unless the spending officer determines, in writing, after the receipt of offers or bids, (1) that the cost of domestic aluminum, glass or steel products is unreasonable or inconsistent with the public interest of the State of West Virginia, (2) that domestic aluminum, glass or steel products are not produced in sufficient quantities to meet the contract requirements, or (3) the available domestic aluminum, glass, or steel do not meet the contract specifications. This provision only applies to public works contracts awarded in an amount more than fifty thousand dollars (\$50,000) or public works contracts that require more than ten thousand pounds of steel products.

The cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than twenty percent (20%) of the bid or offered price for foreign made aluminum, glass, or steel products. If the domestic aluminum, glass or steel products to be supplied or produced in a “substantial labor surplus area”, as defined by the United States Department of Labor, the cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than thirty percent (30%) of the bid or offered price for foreign made aluminum, glass, or steel products. This preference shall be applied to an item of machinery or equipment, as indicated above, when the item is a single unit of equipment or machinery manufactured primarily of aluminum, glass or steel, is part of a public works contract and has the sole purpose or of being a permanent part of a single public works project. This provision does not apply to equipment or machinery purchased by a spending unit for use by that spending unit and not as part of a single public works project.

All bids and offers including domestic aluminum, glass or steel products that exceed bid or offer prices including foreign aluminum, glass or steel products after application of the preferences provided in this provision may be reduced to a price equal to or lower than the lowest bid or offer price for foreign aluminum, glass or steel products plus the applicable preference. If the reduced bid or offer prices are made in writing and supersede the prior bid or offer prices, all bids or offers, including the reduced bid or offer prices, will be reevaluated in accordance with this rule.

43. INTERESTED PARTY SUPPLEMENTAL DISCLOSURE: W. Va. Code § 6D-1-2 requires that for contracts with an actual or estimated value of at least \$1 million, the Vendor must submit to the Agency a disclosure of interested parties prior to beginning work under this Contract. Additionally, the Vendor must submit a supplemental disclosure of interested parties reflecting any new or differing interested parties to the contract, which were not included in the original pre-work interested party disclosure, within 30 days following the completion or termination of the contract. A copy of that form is included with this solicitation or can be obtained from the WV Ethics Commission. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

44. PROHIBITION AGAINST USED OR REFURBISHED: Unless expressly permitted in the solicitation published by the State, Vendor must provide new, unused commodities, and is prohibited from supplying used or refurbished commodities, in fulfilling its responsibilities under this Contract.

45. VOID CONTRACT CLAUSES: This Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law.

46. ISRAEL BOYCOTT: Bidder understands and agrees that, pursuant to W. Va. Code § 5A-3-63, it is prohibited from engaging in a boycott of Israel during the term of this contract.

ADDITIONAL TERMS AND CONDITIONS (Construction Contracts Only)

1. CONTRACTOR'S LICENSE: Until June 15, 2021, West Virginia Code § 21-11-2, and after that date, § 30-42-2, requires that all persons desiring to perform contracting work in this state be licensed. The West Virginia Contractors Licensing Board is empowered to issue the contractor's license. Applications for a contractor's license may be made by contacting the West Virginia Contractor Licensing Board.

The apparent successful Vendor must furnish a copy of its contractor's license prior to the issuance of a contract award document.

2. BONDS: The following bonds must be submitted:

- ☐ **BID BOND:** Pursuant to the requirements contained in W. Va. Code § 5-22-1(c), All Vendors submitting a bid on a construction project shall furnish a valid bid bond in the amount of five percent (5%) of the total amount of the bid protecting the State of West Virginia. **THE BID BOND MUST BE SUBMITTED WITH THE BID OR VENDOR'S BID WILL BE DISQUALIFIED.**
- ☐ **PERFORMANCE BOND:** The apparent successful Vendor shall provide a performance bond in the amount of 100% of the contract. The performance bond must be received by the Purchasing Division prior to Contract award. (Attorney General requires use of the State approved bond forms found at: www.state.wv.us/admin/purchase/forms2.html)
- ☐ **LABOR/MATERIAL PAYMENT BOND:** The apparent successful Vendor shall provide a labor/material payment bond in the amount of 100% of the Contract value. The labor/material payment bond must be delivered to the Purchasing Division prior to Contract award. (Attorney General requires use of the State approved bond forms found at: www.state.wv.us/admin/purchase/forms2.html)
- ☐ **MAINTENANCE BOND:** The apparent successful Vendor shall provide a two (2) year maintenance bond covering the roofing system if the work impacts an existing roof. The amount of the bond must be equal to the price associated with the percentage of the project impacting the roof. The maintenance bond must be issued and delivered to the Purchasing Division prior to Contract award. (Attorney General requires use of the State approved bond forms found at: www.state.wv.us/admin/purchase/forms2.html)

At a minimum, all construction projects require a bid bond, performance bond, and labor/material payment bond. Failure on the part of the state of West Virginia to checkmark the required bonds above does not relieve the vendor from the legal requirement of providing these bonds.

In lieu of the Bid Bond, the Vendor may provide certified checks, cashier's checks, or irrevocable letters of credit. Any certified check, cashier's check, or irrevocable letter of credit provided in lieu of the bid bond must be of the same amount required of the Bid Bond and delivered with the bid.

3. DRUG-FREE WORKPLACE AFFIDAVIT: W. Va. Code § 21-1D-5 provides that any solicitation for a public improvement contract requires each Vendor that submits a bid for the work to submit an affidavit that the Vendor has a written plan for a drug-free workplace policy. If the affidavit is not submitted with the bid submission, the Purchasing Division shall promptly request by telephone and electronic mail that the low bidder and second low bidder provide the affidavit within one business day of the request. Failure to submit the affidavit within one business day of receiving the request shall result in disqualification of the bid. To comply with this law, Vendor should complete the enclosed drug-free workplace affidavit and submit the same with its bid. Failure to submit the signed and notarized drugfree workplace affidavit or a similar affidavit that fully complies with the requirements of the applicable code, within one business day of being requested to do so shall result in disqualification of Vendor's bid. Pursuant to W. Va. Code 21-1D-2(b) and (k), this provision does not apply to public improvement contracts the value of which is \$100,000 or less or temporary or emergency repairs.

3.1. DRUG-FREE WORKPLACE POLICY: Pursuant to W. Va. Code § 21-1D-4, Vendor and its subcontractors must implement and maintain a written drug-free workplace policy that complies with said article. The awarding public authority shall cancel this contract if: (1) Vendor fails to implement and maintain a written drug-free workplace policy described in the preceding paragraph, (2) Vendor fails to provide information regarding implementation of its drug-free workplace policy at the request of the public authority; or (3) Vendor provides to the public authority false information regarding the contractor's drug-free workplace policy.

Pursuant to W. Va. Code 21-1D-2(b) and (k), this provision does not apply to public improvement contracts the value of which is \$100,000 or less or temporary or emergency repairs.

4. DRUG FREE WORKPLACE REPORT: Pursuant to W. Va. Code § 21-1D-7b, no less than once per year, or upon completion of the project, every contractor shall provide a certified report to the public authority which let the contract. For contracts over \$25,000, the public authority shall be the West Virginia Purchasing Division. For contracts of \$25,000 or less, the public authority shall be the agency issuing the contract. The report shall include:

- (1) Information to show that the education and training service to the requirements of West Virginia Code § 21-1D-5 was provided;
- (2) The name of the laboratory certified by the United States Department of Health and Human Services or its successor that performs the drug tests;
- (3) The average number of employees in connection with the construction on the public improvement;
- (4) Drug test results for the following categories including the number of positive tests and the number of negative tests: (A) Pre-employment and new hires; (B) Reasonable suspicion; (C) Post-accident; and (D) Random.

Vendor should utilize the attached Certified Drug Free Workplace Report Coversheet when submitting the report required hereunder. Pursuant to W. Va. Code 21-1D-2(b) and (k), this provision does not apply to public improvement contracts the value of which is \$100,000 or less or temporary or emergency repairs.

5. AIA DOCUMENTS: All construction contracts that will be completed in conjunction with architectural services procured under Chapter 5G of the West Virginia Code will be governed by the attached AIA documents, as amended by the Supplementary Conditions for the State of West Virginia, in addition to the terms and conditions contained herein.

6. PROHIBITION AGAINST GENERAL CONDITIONS: Notwithstanding anything contained in the AIA Documents or the Supplementary Conditions, the State of West Virginia will not pay for general conditions, or winter conditions, or any other condition representing a delay in the contracts. The Vendor is expected to mitigate delay costs to the greatest extent possible and any costs associated with Delays must be specifically and concretely identified. The state will not consider an average daily rate multiplied by the number of days extended to be an acceptable charge.

7. GREEN BUILDINGS MINIMUM ENERGY STANDARDS: In accordance with § 22-29-4, all new building construction projects of public agencies that have not entered the schematic design phase prior to July 1, 2012, or any building construction project receiving state grant funds and appropriations, including public schools, that have not entered the schematic design phase prior to July 1, 2012, shall be designed and constructed complying with the ICC International Energy Conservation Code, adopted by the State Fire Commission, and the ANSI/ASHRAE/IESNA Standard 90.1-2007: Provided, That if any construction project has a commitment of federal funds to pay for a portion of such project, this provision shall only apply to the extent such standards are consistent with the federal standards.

8. LOCAL LABOR MARKET HIRING REQUIREMENT: Pursuant to West Virginia Code §21-1C-1 et seq., Employers shall hire at least seventy-five percent of employees for public improvement construction projects from the local labor market, to be rounded off, with at least two employees from outside the local labor market permissible for each employer per project.

Any employer unable to employ the minimum number of employees from the local labor market shall inform the nearest office of Workforce West Virginia of the number of qualified employees needed and provide a job description of the positions to be filled.

If, within three business days following the placing of a job order, Workforce West Virginia is unable to refer any qualified job applicants to the employer or refers less qualified job applicants than the number requested, then Workforce West Virginia shall issue a waiver to the employer stating the unavailability of applicant and shall permit the employer to fill any positions covered by the waiver from outside the local labor market. The waiver shall be in writing and shall be issued within the prescribed three days. A waiver certificate shall be sent to both the employer for its permanent project records and to the public authority.

Any employer who violates this requirement is subject to a civil penalty of \$250 per each employee less than the required threshold of seventy-five percent per day of violation after receipt of a notice of violation.

Any employer that continues to violate any provision of this article more than fourteen calendar days after receipt of a notice of violation is subject to a civil penalty of \$500 per each employee less than the required threshold of seventy-five percent per day of violation.

The following terms used in this section have the meaning shown below.

(1) The term “construction project” means any construction, reconstruction, improvement, enlargement, painting, decorating or repair of any public improvement let to contract in an amount equal to or greater than \$500,000. The term “construction project” does not include temporary or emergency repairs;

(2) The term “employee” means any person hired or permitted to perform hourly work for wages by a person, firm or corporation in the construction industry; The term “employee” does not include:(i) Bona fide employees of a public authority or individuals engaged in making temporary or emergency repairs;(ii) Bona fide independent contractors; or(iii) Salaried supervisory personnel necessary to assure efficient execution of the employee's work;

(3) The term “employer” means any person, firm or corporation employing one or more employees on any public improvement and includes all contractors and subcontractors;

(4) The term “local labor market” means every county in West Virginia and any county outside of West Virginia if any portion of that county is within fifty miles of the border of West Virginia;

(5) The term “public improvement” includes the construction of all buildings, roads, highways, bridges, streets, alleys, sewers, ditches, sewage disposal plants, waterworks, airports and all other structures that may be let to contract by a public authority, excluding improvements funded, in whole or in part, by federal funds.

9. DAVIS-BACON AND RELATED ACT WAGE RATES:

☐ The work performed under this contract is federally funded in whole, or in part. Pursuant to _____, Vendors are required to pay applicable Davis-Bacon wage rates.

☐ The work performed under this contract is not subject to Davis-Bacon wage rates.

10. SUBCONTRACTOR LIST SUBMISSION: In accordance with W. Va. Code § 5-22-1, the apparent low bidder on a contract valued at more than \$250,000.00 for the construction, alteration, decoration, painting or improvement of a new or existing building or structure shall submit a list of all subcontractors who will perform more than \$25,000.00 of work on the project including labor and materials. (This section does not apply to any other construction projects, such as highway, mine reclamation, water or sewer projects.) The subcontractor list shall be provided to the Purchasing Division within one business day of the opening of bids for review. If the apparent low bidder fails to submit the subcontractor list, the Purchasing Division shall promptly request by telephone and electronic mail that the low bidder and second low bidder provide the subcontractor list within one business day of the request. Failure to submit the subcontractor list within one business day of receiving the request shall result in disqualification of the bid.

If no subcontractors who will perform more than \$25,000.00 of work are to be used to complete the project, the apparent low bidder must make this clear on the subcontractor list, in the bid itself, or in response to the Purchasing Division's request for the subcontractor list.

a. Required Information. The subcontractor list must contain the following information:

- i. Bidder's name
- ii. Name of each subcontractor performing more than \$25,000 of work on the project.
- iii. The license number of each subcontractor, as required by W. Va. Code § 21-11-1 et. seq.
- iv. If applicable, a notation that no subcontractor will be used to perform more than \$25,000.00 of work. (This item iv. is not required if the vendor makes this clear in the bid itself or in documentation following the request for the subcontractor list.)

b. Subcontractor List Submission Form: The subcontractor list may be submitted in any form, including the attached form, as long as the required information noted above is included. If any information is missing from the bidder's subcontractor list submission, it may be obtained from other documents such as bids, emails, letters, etc. that accompany the subcontractor list submission.

c. Substitution of Subcontractor. Written approval must be obtained from the State Spending Unit before any subcontractor substitution is permitted. Substitutions are not permitted unless:

- i. The subcontractor listed in the original bid has filed for bankruptcy;
- ii. The subcontractor in the original bid has been debarred or suspended; or
- iii. The contractor certifies in writing that the subcontractor listed in the original bid fails, is unable, or refuses to perform his subcontract.

Subcontractor List Submission (Construction Contracts Only)

Bidder's Name: _____

☐ Check this box if no subcontractors will perform more than \$25,000.00 of work to complete the project.

Subcontractor Name	License Number if Required by W. Va. Code § 21-11-1 et. seq.

Attach additional pages if necessary

ADDITIONAL TERMS AND CONDITIONS
(Architectural and Engineering Contracts Only)

1. PLAN AND DRAWING DISTRIBUTION: All plans and drawings must be completed and available for distribution at least five business days prior to a scheduled pre-bid meeting for the construction or other work related to the plans and drawings.

2. PROJECT ADDENDA REQUIREMENTS: The Architect/Engineer and/or Agency shall be required to abide by the following schedule in issuing construction project addenda. The Architect/Engineer shall prepare any addendum materials for which it is responsible, and a list of all vendors that have obtained drawings and specifications for the project. The Architect/Engineer shall then send a copy of the addendum materials and the list of vendors to the State Agency for which the contract is issued to allow the Agency to make any necessary modifications. The addendum and list shall then be forwarded to the Purchasing Division buyer by the Agency. The Purchasing Division buyer shall send the addendum to all interested vendors and, if necessary, extend the bid opening date. Any addendum should be received by the Purchasing Division at least fourteen (14) days prior to the bid opening date.

3. PRE-BID MEETING RESPONSIBILITIES: The Architect/Engineer shall be available to attend any pre-bid meeting for the construction or other work resulting from the plans, drawings, or specifications prepared by the Architect/Engineer.

4. AIA DOCUMENTS: All construction contracts that will be completed in conjunction with architectural services procured under Chapter 5G of the West Virginia Code will be governed by the attached AIA documents, as amended by the Supplementary Conditions for the State of West Virginia, in addition to the terms and conditions contained herein. The terms and conditions of this document shall prevail over anything contained in the AIA Documents or the Supplementary Conditions.

5. GREEN BUILDINGS MINIMUM ENERGY STANDARDS: In accordance with West Virginia Code § 22-29-4, all new building construction projects of public agencies that have not entered the schematic design phase prior to July 1, 2012, or any building construction project receiving state grant funds and appropriations, including public schools, that have not entered the schematic design phase prior to July 1, 2012, shall be designed and constructed complying with the ICC International Energy Conservation Code, adopted by the State Fire Commission, and the ANSI/ASHRAE/IESNA Standard 90.1-2007: Provided, That if any construction project has a commitment of federal funds to pay for a portion of such project, this provision shall only apply to the extent such standards are consistent with the federal standards.

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Chris Kruse, Chief Revenue Officer


(Address) 1101 17th Street NW, Floor 12, Washington, DC 20036

(Phone Number) / (Fax Number) 415-786-9471

(email address) ckruse@casepoint.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

Casepoint, LLC
(Company) 
(Signature of Authorized Representative)
Chris Kruse, Chief Revenue Officer
(Printed Name and Title of Authorized Representative) (Date)
415-786-9471
(Phone Number) (Fax Number)
ckruse@casepoint.com
(Email Address)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.:

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- ☒ Addendum No. 1
- ☒ Addendum No. 2
- ☐ Addendum No. 3
- ☐ Addendum No. 4
- ☐ Addendum No. 5

- ☐ Addendum No. 6
- ☐ Addendum No. 7
- ☐ Addendum No. 8
- ☐ Addendum No. 9
- ☐ Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Casepoint, LLC

Company



Authorized Signature

March 5, 2025

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.

REQUEST FOR QUOTATION
e-Discovery Software as a Service

SPECIFICATIONS

1. **PURPOSE AND SCOPE:** The West Virginia Purchasing Division is soliciting bids on behalf of West Virginia Office of Technology to establish a contract for an e-Discovery software as a service. This software will be used for discovery in legal proceedings to process emails and other files. The software will facilitate keyword searching, document review, privilege report creation, data tagging and redaction prior to final report being released.

WVOT provides highly reliable, protected, and cost-effective technology services to approximately 25,000 computers and 20,000 network users. Services are delivered by approximately 200 full-time and temporary employees and supplemented by specialized contract services and staff on an as-needed basis. There are approximately 210 entities total within the executive branch where services are provided. Funding for the Office of Technology is derived from a fee for services model.

2. **DEFINITIONS:** The terms listed below shall have the meanings assigned to them below. Additional definitions can be found in section 2 of the General Terms and Conditions.

2.1 **“Business Hours”** means Monday - Friday 8:00 AM to 5:00 PM EST excluding weekends and Federal and State holidays, which are as follows:

- 2.1.1 New Year’s Day (January 1)
- 2.1.2 Martin Luther King Day (Third Monday in January)
- 2.1.3 President’s Day (Third Monday in February)
- 2.1.4 Memorial Day (Last Monday in May)
- 2.1.5 West Virginia Day (June 20)
- 2.1.6 Independence Day (July 4)
- 2.1.7 Labor Day (First Monday in September)
- 2.1.8 Columbus Day (Second Monday in October)
- 2.1.9 Veterans Day (November 11)
- 2.1.10 Thanksgiving (Fourth Thursday in November)
- 2.1.11 Day After Thanksgiving (Fourth Friday in November)
- 2.1.12 Christmas Day (December 25)

2.2 **“Contract Services”** means an e-Discovery system as more fully described in these specifications.

2.3 **“Pricing Page”** means the pages, contained wvOASIS or attached hereto as Exhibit A, upon which Vendor should list its proposed price for the Contract Services.

2.4 **“Solicitation”** means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

3. **QUALIFICATIONS:** Vendor, or Vendor’s staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications:

REQUEST FOR QUOTATION
e-Discovery Software as a Service

3.1. The Vendor must be compliant with Internal Revenue Service (IRS) 1075, Section AC-17 Remote Access, and Section 3.3.1. Cloud Computing.

4. MANDATORY REQUIREMENTS:

4.1 Mandatory Contract Services Requirements and Deliverables: Contract Services must meet or exceed the mandatory requirements listed below.

4.1.1 General Requirements– e-Discovery System

4.1.1.1 The Vendor must provide an e-Discovery System that is cloud-based (Software as a Service Model). as well as support Automated Cloud Data Collections and Connectors

4.1.1.2 The system must contain the following capabilities within a single platform that does not require integration with other software: self-service data loading, self-service data processing, client administration, self-service, productions, review, and analytics capabilities.

4.1.1.3 The Vendor must provide an e-Discovery System with unlimited user seats for a minimum of 12 months from date of award.

4.1.1.4 The system must allow client administrators to have the ability to set-up new users or workspaces and assign roles and permissions to new users.

4.1.1.5 The system must allow a user to have multiple roles and toggle between roles. For example, a client administrator can toggle between user roles to validate user permissions and provide user support.

4.1.1.6 The system must not require additional licenses and/or software from third parties.

4.1.1.7 The system must allow the customer/client administrators the ability to remove/delete documents and create archives from the platform.

REQUEST FOR QUOTATION
e-Discovery Software as a Service

4.1.1.8 The system must be accessible to an unlimited number of users and allow access to at least 50 concurrent cases each having at least one million documents without degradation to speed.

4.1.1.9 The system must be a configurable Platform that allows the administrators to configure applications like request tracking and FOIA requests.

4.1.1.10 The system must be built on scalable architecture with a storage capacity of at least two petabytes of data.

4.1.1.11 The Vendor must provide an e-Discovery System that features the following:

4.1.1.11.1 A system that has two-factor authentication access.

4.1.1.11.2 A system that allows the Agency to have 100% data input automation. The Vendor must not have access to Agency-owned data.

4.1.1.11.3 A system that provides 256-bit encryption to the data when at rest and in transit.

4.1.1.11.4 A system that scans files for viruses.

4.1.1.11.5 A system that allows for load file import and export.

4.1.2 Data Loading & Processing- e-Discovery System

4.1.2.1 The system must allow the Agency to have 100% data input automation.

4.1.2.2 The system must allow the user to load raw data such as PSTs, zip files, and other ESI for processing.

REQUEST FOR QUOTATION
e-Discovery Software as a Service

- 4.1.2.3 The system must allow the client administrator to move data between data stores and conduct early case assessment, including running search terms, and listing and counting file types reports, prior to making the data available to reviewers.
- 4.1.2.4 The system must allow the customer to create, save, and upload templates for data processing.
- 4.1.2.5 The system must have pre-built utilities to support processing for various files including imaging, loading, and text files.
- 4.1.2.6 The system must support uploading up to 10 GB of data directly from web-browser via “drag and drop”.
- 4.1.2.7 The system must allow loading and processing of a data set that has at least 1 terabyte of documents, data, or ESI, into the review tool.
- 4.1.2.8 The system must support data reduction and culling (De-NIST; custodial and global Deduplication; filtering by Custodian, file type, date; keyword searching) during processing.
- 4.1.2.9 The system must include built-in ESI processing capabilities (extraction of text and metadata, imaging, numbering, OCR, load file creation).
- 4.1.2.10 The system must keep emails and families together and locate orphaned documents during processing.
- 4.1.2.11 The system must support extraction and processing of files within container files such as zip and rar, and support the processing of files in nested containers or folders.
- 4.1.2.12 The system must have the ability to ingest, process, and view multiple file types.
- 4.1.2.13 The system must allow for load file import and export.
- 4.1.2.14 The system must allow the user the ability to create templates for processing, production, import, export.

REQUEST FOR QUOTATION
e-Discovery Software as a Service

4.1.2.15 The system must be able to securely transfer ESI to the review tool.

4.1.3 Review – e-Discovery System

4.1.3.1 The system must allow users to review and analyze ESI productions.

4.1.3.2 The system must allow users to identify and remove duplicate documents and data.

4.1.3.3 The system must allow users to redact and highlight portions of the document.

4.1.3.4 The system must allow users to search, tag, index, and code information and provide advance search features including but not limited to keyword, Boolean, stemming, wildcard, fuzzy, proximity and other search types.

4.1.3.5 The system must process searches, display documents, and allow users to perform document review with minimal loading times.

4.1.3.6 The system must include a file viewer that easily and quickly opens files without needing to install additional applications. Supported files must include: .docx, .xlsx, .pdf, .jpg, .jpeg, .mov, avi, .rtf, .txt., pub, .pptx.

4.1.3.7 The system must support searching on tags/codes and metadata.

4.1.3.8 The system must allow the user the option to assign and self-assign batches for review.

4.1.3.9 The system must provide search engines that support both Elasticsearch and dtSearch indexing and searching options within a single matter.

4.1.3.10 The system must allow the user to create workspaces, folders, etc., for customizable document organization.

REQUEST FOR QUOTATION
e-Discovery Software as a Service

4.1.3.11 The system must provide full administrator rights to the customer, including the ability to assign roles/permissions, create review assignments and/ or review batches for reviewers.

4.1.3.12 The system must allow for the customization of coding panels.

4.1.4 Advanced Analytics – eDiscovery System

4.1.4.1 The system must include the following content & context analysis capabilities: topic clustering, email threading, near-duplicate analysis, entities recognition.

4.1.4.2 The system must provide predictive coding, advanced artificial intelligence (AI) and Technology Assisted Review (TAR) technologies including TAR 1.0 and TAR 3.0.

4.1.4.3 The system must provide Active Learning (story builder with continuous active learning analytics).

4.1.5 Security – eDiscovery System

4.1.5.1 The system must provide secure authorized access and have multi-factor authentication for each user to prevent unauthorized access.

4.1.5.2 The systems must provide automatic session termination if no activity with a prescribed period of time.

4.1.5.3 The system must allow a client administrator to restrict security rights at the individual, group or role level.

4.1.5.4 The system must provide a security level that allows system administrators to add new users to the system and edit existing user permissions.

4.1.5.5 The vendor must provide regular maintenance including new releases and updates.

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4.1.5.6 The system must provide at least 256-bit encryption to the data when at rest and in transit.

4.1.6 Production – eDiscovery System

4.1.6.1 The system must provide production of the ESI in a variety of formats including as searchable PDF, native or images and text with a load file.

4.1.6.2 The system must have a wizard-driven production process.

4.1.6.3 The system must have self-service production capabilities to allow the user to prepare and export from start to finish/download.

4.1.6.4 The system must allow the user to view all productions for a single file in the review platform.

4.1.7 Professional Services and Training – eDiscovery

4.1.7.1 The vendor must provide live training (which may be virtual).

4.1.7.2 The vendor must provide reviewer training and client administrator/organization administrator training.

4.1.7.3 The vendor must record live training and provide recorded training to the client at no additional cost.

4.1.7.4 The system must provide access to a knowledge base or help center, technical documentation, and online support resources.

4.1.7.5 The vendor must provide support services for the initial setup.

4.1.7.6 The vendor must provide support services for the duration of the contract for ongoing maintenance.

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4.1.7.7 The vendor must offer client services support including project management and technical support services.

4.1.8 Support - eDiscovery

4.1.8.1 Support by telephone, online, in-app, and email 24 hours-a-day, 7 days-a-week, 365 days-a-year for troubleshooting technical issues

4.1.8.2 A response time of a minimum of 1 day to request for technical support.

4.1.8.3 Access to knowledgebase, technical documentation, and online support resources.

4.1.9 Billing - eDiscovery

4.1.9.1 Vendor will round up to the nearest next whole gigabyte (GB) for billing and auditing purposes. (Example 1.2GB will be billed at 2.0 GB)

4.1.9.2 Vendor will invoice monthly and bill at the maximum gigabyte (GB) capacity used by the state.

4.1.9.3 Vendor's proposed solution must provide billing capabilities designed to simplify the procedures of a chargeback model, as well as provide a holistic view of service. The state desires the billing detail to include but not be limited to billing by agency, consumption usage by each agency.

4.1.10 Software as a Service Addendum

4.1.10.1 Vendor must sign the attached Software as a Service Addendum prior to award.

4.1.11 Optional Renewals

4.1.11.1 Vendor will include in their bid the cost of optional Annual renewals for years 2, 3, and 4. These optional Annual renewals will be initiated on Agency request authorized under the authority of the Purchasing Division.

5 CONTRACT AWARD:

5.1 Contract Award: The Contract is intended to provide Agency with a purchase price for the Contract Services. The Contract shall be awarded to the

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Vendor that provides the Contract Services meeting the required specifications for the lowest overall total cost as shown on the Pricing Pages.

5.2 Contract will be evaluated on all lines but only awarded for the first year with the option for renewal at the end of the first-year term. Renewal options for years 2, 3, and 4 will be initiated by the Agency, agreed to by the Vendor and processed by the West Virginia Purchasing Division as Change Orders for subsequent years.

5.3 Pricing Page: Vendor should complete the attached Exhibit A - Pricing Page by providing the unit cost per Gigabyte (GB) per month. The unit price will be multiplied with the quantity to provide the extended cost. The calculated Overall Total Cost must be entered into wvOASIS pricing section for commodity line 1. The Vendor should complete the Pricing Page in full as failure to complete the Pricing Page in its entirety may result in Vendor's bid being disqualified.

5.3.1 The Pricing Page contains a list of the Contract Items and estimated purchase volume. The estimated purchase volume for each item represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied.

5.3.2 Vendor should provide with their bid a copy of any and all Software Terms and Conditions or licenses that the State of West Virginia or the Agency will have to agree to or accept as a part of this solicitation. This information will be required before contract is issued.

5.3.3 Vendor should include a copy of any Maintenance Terms and Conditions or Licenses that the State of West Virginia or the Agency will be required to agree to and accept as a part of this solicitation. This information will be required before contract is issued.

5.3.4 Vendor should type or electronically enter the information into the Pricing Pages through wvOASIS, if available, or as an electronic document.

6 PERFORMANCE: Vendor and Agency shall agree upon a schedule for performance of Contract Services and Contract Services Deliverables, unless such a schedule is already

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included herein by Agency. In the event that this Contract is designated as an open-end contract, Vendor shall perform in accordance with the release orders that may be issued against this Contract.

- 7 PAYMENT:** Agency shall pay a flat fee, as shown on the Pricing Pages, for all Contract Services performed and accepted under this Contract. Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia.
- 8 TRAVEL:** Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Any anticipated mileage or travel costs may be included in the flat fee or hourly rate listed on Vendor's bid, but such costs will not be paid by the Agency separately.
- 9 FACILITIES ACCESS:** Performance of Contract Services may require access cards and/or keys to gain entrance to Agency's facilities. In the event that access cards and/or keys are required:
 - 9.1** Vendor must identify principal service personnel which will be issued access cards and/or keys to perform service.
 - 9.2** Vendor will be responsible for controlling cards and keys and will pay replacement fee, if the cards or keys become lost or stolen.
 - 9.3** Vendor shall notify Agency immediately of any lost, stolen, or missing card or key.
 - 9.4** Anyone performing under this Contract will be subject to Agency's security protocol and procedures.
 - 9.5** Vendor shall inform all staff of Agency's security protocol and procedures.

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10 VENDOR DEFAULT: The following shall be considered a vendor default under this Contract.

10.1 Failure to perform Contract Services in accordance with the requirements contained herein.

10.2 Failure to comply with other specifications and requirements contained herein.

10.3 Failure to comply with any laws, rules, and ordinances applicable to the Contract Services provided under this Contract.

10.4 Failure to remedy deficient performance upon request.

10.5 The following remedies shall be available to Agency upon default:

10.5.1 Immediate cancellation of the Contract.

10.5.2 Immediate cancellation of one or more release orders issued under this Contract.

10.5.3 Any other remedies available in law or equity.

11 MISCELLANEOUS:

Contract Manager: During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.

Contract Manager:	Danielle Gray, Account Manager / Project Manager
Telephone Number:	202-681-2086
Fax Number:	
Email Address:	dgray@casepoint.com

APPENDIX A:

SOFTWARE AS A SERVICE ADDENDUM

Begins on next page.

Software as a Service Addendum

1. Definitions:

Acceptable alternative data center location means a country that is identified as providing equivalent or stronger data protection than the United States, in terms of both regulation and enforcement. DLA Piper's Privacy Heatmap shall be utilized for this analysis and may be found at <https://www.dlapiperdataprotection.com/index.html?t=world-map&c=US&c2=IN>.

Authorized Persons means the service provider's employees, contractors, subcontractors or other agents who have responsibility in protecting or have access to the public jurisdiction's personal data and non-public data to enable the service provider to perform the services required.

Data Breach means the unauthorized access and acquisition of unencrypted and unredacted personal data that compromises the security or confidentiality of a public jurisdiction's personal information and that causes the service provider or public jurisdiction to reasonably believe that the data breach has caused or will cause identity theft or other fraud.

Individually Identifiable Health Information means information that is a subset of health information, including demographic information collected from an individual, and (1) is created or received by a health care provider, health plan, employer or health care clearinghouse; and (2) relates to the past, present or future physical or mental health or condition of an individual; the provision of health care to an individual; or the past, present or future payment for the provision of health care to an individual; and (a) that identifies the individual; or (b) with respect to which there is a reasonable basis to believe the information can be used to identify the individual.

Non-Public Data means data, other than personal data, that is not subject to distribution to the public as public information. It is deemed to be sensitive and confidential by the public jurisdiction because it contains information that is exempt by statute, ordinance or administrative rule from access by the general public as public information.

Personal Data means data that includes information relating to a person that identifies the person by first name or first initial, and last name, and has any of the following personally identifiable information (PII): government-issued identification numbers (e.g., Social Security, driver's license, state identification card); financial account information, including account number, credit or debit card numbers; or protected health information (PHI).

Protected Health Information (PHI) means individually identifiable health information transmitted by electronic media, maintained in electronic media, or transmitted or maintained in any other form or medium. PHI excludes education records covered by the Family Educational Rights and Privacy Act (FERPA), as amended, 20 U.S.C. 1232g, records described at 20 U.S.C. 1232g(a)(4)(B)(iv) and employment records held by a covered entity in its role as employer.

Public Jurisdiction means any government or government agency that uses these terms and conditions. The term is a placeholder for the government or government agency.

Public Jurisdiction Data means all data created or in any way originating with the public jurisdiction, and all data that is the output of computer processing or other electronic manipulation of any data that was created by or in any way originated with the public jurisdiction, whether such data or output is stored on the public jurisdiction's hardware, the service provider's hardware or exists in any system owned, maintained or otherwise controlled by the public jurisdiction or by the service provider.

Public Jurisdiction Identified Contact means the person or persons designated in writing by the public jurisdiction to receive security incident or breach notification.

Restricted data means personal data and non-public data.

Security Incident means the actual unauthorized access to personal data or non-public data the service provider believes could reasonably result in the use, disclosure or theft of a public jurisdiction's unencrypted personal data or non-public data within the possession or control of the service provider. A security incident may or may not turn into a data breach.

Service Provider means the contractor and its employees, subcontractors, agents and affiliates who are providing the services agreed to under the contract.

Software-as-a-Service (SaaS) means the capability provided to the consumer to use the provider's applications running on a cloud infrastructure. The applications are accessible from various client devices through a thin-client interface such as a Web browser (e.g., Web-based email) or a program interface. The consumer does not manage or control the underlying cloud infrastructure including network, servers, operating systems, storage or even individual application capabilities, with the possible exception of limited user-specific application configuration settings.

2. Data Ownership: The public jurisdiction will own all right, title and interest in its data that is related to the services provided by this contract. The service provider shall not access public jurisdiction user accounts or public jurisdiction data, except (1) in the course of data center operations, (2) in response to service or technical issues, (3) as required by the express terms of this contract or (4) at the public jurisdiction's written request.

3. Data Protection and Privacy: Protection of personal privacy and data shall be an integral part of the business activities of the service provider to ensure there is no inappropriate or unauthorized use of public jurisdiction information at any time. To this end, the service provider shall safeguard the confidentiality, integrity and availability of public jurisdiction information and comply with the following conditions:

- a) The service provider shall implement and maintain appropriate administrative, technical and physical security measures to safeguard against unauthorized access, disclosure or theft of personal data and non-public data. In Appendix A,

the public jurisdiction shall indicate whether restricted information will be processed by the service provider. Such security measures shall be in accordance with recognized industry practice and not less stringent than the measures the service provider applies to its own personal data and non-public data of similar kind. The service provider shall ensure that all such measures, including the manner in which personal data and non-public data are collected, accessed, used, stored, processed, disposed of and disclosed, comply with applicable data protection and privacy laws, as well as the terms and conditions of this Addendum and shall survive termination of the underlying contract.

- b) The service provider represents and warrants that its collection, access, use, storage, disposal and disclosure of personal data and non-public data do and will comply with all applicable federal and state privacy and data protection laws, as well as all other applicable regulations, policies and directives.
- c) The service provider shall support third-party multi-factor authentication integration with the public jurisdiction third-party identity provider to safeguard personal data and non-public data.
- d) If, in the course of its engagement by the public jurisdiction, the service provider has access to or will collect, access, use, store, process, dispose of or disclose credit, debit or other payment cardholder information, the service provider shall at all times remain in compliance with the Payment Card Industry Data Security Standard ("PCI DSS") requirements, including remaining aware at all times of changes to the PCI DSS and promptly implementing all procedures and practices as may be necessary to remain in compliance with the PCI DSS, in each case, at the service provider's sole cost and expense. All data obtained by the service provider in the performance of this contract shall become and remain the property of the public jurisdiction.
- e) All personal data shall be encrypted at rest and in transit with controlled access. Unless otherwise stipulated, the service provider is responsible for encryption of the personal data.
- f) Unless otherwise stipulated, the service provider shall encrypt all non-public data at rest and in transit, in accordance with recognized industry practice. The public jurisdiction shall identify data it deems as non-public data to the service provider.
- g) At no time shall any data or process – that either belong to or are intended for the use of a public jurisdiction or its officers, agents or employees — be copied, disclosed or retained by the service provider or any party related to the service provider for subsequent use in any transaction that does not include the public jurisdiction.
- h) The service provider shall not use or disclose any information collected in connection with the service issued from this proposal for any purpose other than fulfilling the service.
- i) Data Location. For non-public data and personal data, the service provider shall provide its data center services to the public jurisdiction and its end users solely from data centers in the U.S. Storage of public jurisdiction data at rest shall be located solely in data centers in the U.S. The service provider shall not allow its personnel or contractors to store public jurisdiction data on portable devices, including personal computers, except for devices that are used and kept only at its

U.S. data centers. With agreement from the public jurisdiction, this term may be met by the service provider providing its services from an acceptable alternative data center location, which agreement shall be stated in Appendix A. The Service Provider may also request permission to utilize an acceptable alternative data center location during a procurement's question and answer period by submitting a question to that effect. The service provider shall permit its personnel and contractors to access public jurisdiction data remotely only as required to provide technical support.

4. Security Incident or Data Breach Notification: The service provider shall inform the public jurisdiction of any confirmed security incident or data breach.

- a) Incident Response: The service provider may need to communicate with outside parties regarding a security incident, which may include contacting law enforcement, fielding media inquiries and seeking external expertise as defined by law or contained in the contract. Discussing security incidents with the public jurisdiction shall be handled on an urgent as-needed basis, as part of service provider communication and mitigation processes defined by law or contained in the contract.
- b) Security Incident Reporting Requirements: The service provider shall report a confirmed Security Incident as soon as practicable, but no later than twenty-four (24) hours after the service provider becomes aware of it, to: (1) the department privacy officer, by email, with a read receipt, identified in Appendix A; and, (2) unless otherwise directed by the public jurisdiction in the underlying contract, the WVOT Online Computer Security and Privacy Incident Reporting System at <https://apps.wv.gov/ot/ir/Default.aspx>, and (3) the public jurisdiction point of contact for general contract oversight/administration. The following information shall be shared with the public jurisdiction: (1) incident phase (detection and analysis; containment, eradication and recovery; or post-incident activity), (2) projected business impact, and, (3) attack source information.
- c) Breach Reporting Requirements: Upon the discovery of a data breach or unauthorized access to non-public data, the service provider shall immediately report to: (1) the department privacy officer, by email, with a read receipt, identified in Appendix A; and, (2) unless otherwise directed by the public jurisdiction in the underlying contract, the WVOT Online Computer Security and Privacy Incident Reporting System at <https://apps.wv.gov/ot/ir/Default.aspx>, and the public jurisdiction point of contact for general contract oversight/administration.

5. Breach Responsibilities: This section only applies when a data breach occurs with respect to personal data within the possession or control of the service provider.

- a) Immediately after being awarded a contract, the service provider shall provide the public jurisdiction with the name and contact information for an employee of service provider who shall serve as the public jurisdiction's primary security contact and shall be available to assist the public jurisdiction twenty-four (24) hours per day, seven (7) days per week as a contact in resolving obligations associated with a data breach. The service provider may provide this information in Appendix A.

- b) Immediately following the service provider's notification to the public jurisdiction of a data breach, the parties shall coordinate cooperate with each other to investigate the data breach. The service provider agrees to fully cooperate with the public jurisdiction in the public jurisdiction's handling of the matter, including, without limitation, at the public jurisdiction's request, making available all relevant records, logs, files, data reporting and other materials required to comply with applicable law and regulation.
- c) Within 72 hours of the discovery, the service provider shall notify the parties listed in 4(c) above, to the extent known: (1) date of discovery; (2) list of data elements and the number of individual records; (3) description of the unauthorized persons known or reasonably believed to have improperly used or disclosed the personal data; (4) description of where the personal data is believed to have been improperly transmitted, sent, or utilized; and, (5) description of the probable causes of the improper use or disclosure.
- d) The service provider shall (1) cooperate with the public jurisdiction as reasonably requested by the public jurisdiction to investigate and resolve the data breach, (2) promptly implement necessary remedial measures, if necessary, and prevent any further data breach at the service provider's expense in accordance with applicable privacy rights, laws and regulations and (3) document responsive actions taken related to the data breach, including any post-incident review of events and actions taken to make changes in business practices in providing the services, if necessary.
- e) If a data breach is a direct result of the service provider's breach of its contract obligation to encrypt personal data or otherwise prevent its release, the service provider shall bear the costs associated with (1) the investigation and resolution of the data breach; (2) notifications to individuals, regulators or others required by state or federal law; (3) a credit monitoring service (4) a website or a toll-free number and call center for affected individuals required by state law — all not to exceed the average per record per person cost calculated for data breaches in the United States in the most recent Cost of Data Breach Study: Global Analysis published by the Ponemon Institute at the time of the data breach (or other similar publication if the named publication has not issued an updated average per record per cost in the last 5 years at the time of the data breach); and (5) complete all corrective actions as reasonably determined by service provider based on root cause. The service provider agrees that it shall not inform any third party of any data breach without first obtaining the public jurisdiction's prior written consent, other than to inform a complainant that the matter has been forwarded to the public jurisdiction's legal counsel and/or engage a third party with appropriate expertise and confidentiality protections for any reason connected to the data breach. Except with respect to where the service provider has an independent legal obligation to report a data breach, the service provider agrees that the public jurisdiction shall have the sole right to determine: (1) whether notice of the data breach is to be provided to any individuals, regulators, law enforcement agencies, consumer reporting agencies or others, as required by law or regulation, or otherwise in the public jurisdiction's discretion; and (2) the contents of such notice, whether any

type of remediation may be offered to affected persons, and the nature and extent of any such remediation. The service provider retains the right to report activity to law enforcement.

6. Notification of Legal Requests: The service provider shall contact the public jurisdiction upon receipt of any electronic discovery, litigation holds, discovery searches and expert testimonies related to the public jurisdiction's data under this contract, or which in any way might reasonably require access to the data of the public jurisdiction. The service provider shall not respond to subpoenas, service of process and other legal requests related to the public jurisdiction without first notifying the public jurisdiction, unless prohibited by law from providing such notice.

7. Termination and Suspension of Service:

- a) In the event of a termination of the contract, the service provider shall implement an orderly return of public jurisdiction data within the time period and format specified in the contract (or in the absence of a specified time and format, a mutually agreeable time and format) and after the data has been successfully returned, securely and permanently dispose of public jurisdiction data.
- b) During any period of service suspension, the service provider shall not take any action to intentionally erase any public jurisdiction data.
- c) In the event the contract does not specify a time or format for return of the public jurisdiction's data and an agreement has not been reached, in the event of termination of any services or agreement in entirety, the service provider shall not take any action to intentionally erase any public jurisdiction data for a period of:
 - 10 days after the effective date of termination, if the termination is in accordance with the contract period
 - 30 days after the effective date of termination, if the termination is for convenience
 - 60 days after the effective date of termination, if the termination is for cause

After such period, the service provider shall have no obligation to maintain or provide any public jurisdiction data and shall thereafter, unless legally prohibited, delete all public jurisdiction data in its systems or otherwise in its possession or under its control.

- d) The public jurisdiction shall be entitled to any post-termination assistance generally made available with respect to the services, unless a unique data retrieval arrangement has been established as part of the Contract.
- e) The service provider shall securely dispose of all requested data in all of its forms, such as disk, CD/ DVD, backup tape and paper, when requested by the public jurisdiction. Data shall be permanently deleted and shall not be recoverable, according to National Institute of Standards and Technology (NIST)-approved methods. Certificates of destruction shall be provided to the public jurisdiction.

8. Background Checks: The service provider shall conduct criminal background checks in compliance with W.Va. Code §15-2D-3 and not utilize any staff to fulfill the obligations

of the contract, including subcontractors, who have been convicted of any crime of dishonesty, including but not limited to criminal fraud, or otherwise convicted of any felony or misdemeanor offense for which incarceration for up to 1 year is an authorized penalty. The service provider shall promote and maintain an awareness of the importance of securing the public jurisdiction's information among the service provider's employees and agents.

9. Oversight of Authorized Persons: During the term of each authorized person's employment or engagement by service provider, service provider shall at all times cause such persons to abide strictly by service provider's obligations under this Agreement and service provider's standard policies and procedures. The service provider further agrees that it shall maintain a disciplinary process to address any unauthorized access, use or disclosure of personal data by any of service provider's officers, partners, principals, employees, agents or contractors.

10. Access to Security Logs and Reports: The service provider shall provide reports to the public jurisdiction in CSV format agreed to by both the service provider and the public jurisdiction. Reports shall include user access (successful and failed attempts), user access IP address, user access history and security logs for all public jurisdiction files and accounts related to this contract.

11. Data Protection Self-Assessment: The service provider shall perform a Cloud Security Alliance STAR Self-Assessment by completing and submitting the "Consensus Assessments Initiative Questionnaire" to the Public Jurisdiction Identified Contact. The service provider shall submit its self-assessment to the public jurisdiction prior to contract award and, upon request, annually thereafter, on the anniversary of the date of contract execution. Any deficiencies identified in the assessment will entitle the public jurisdiction to disqualify the bid or terminate the contract for cause.

12. Data Center Audit: The service provider shall perform an audit of its data center(s) at least annually at its expense and provide a redacted version of the audit report upon request. The service provider may remove its proprietary information from the redacted version. A Service Organization Control (SOC) 2 audit report or approved equivalent sets the minimum level of a third-party audit. Any deficiencies identified in the report or approved equivalent will entitle the public jurisdiction to disqualify the bid or terminate the contract for cause.

13. Change Control and Advance Notice: The service provider shall give 30 days, advance notice (to the public jurisdiction of any upgrades (e.g., major upgrades, minor upgrades, system changes) that may impact service availability and performance. A major upgrade is a replacement of hardware, software or firmware with a newer or better version in order to bring the system up to date or to improve its characteristics.

14. Security:

- a) At a minimum, the service provider's safeguards for the protection of data shall include: (1) securing business facilities, data centers, paper files, servers, back-up

systems and computing equipment, including, but not limited to, all mobile devices and other equipment with information storage capability; (2) implementing network, device application, database and platform security; 3) securing information transmission, storage and disposal; (4) implementing authentication and access controls within media, applications, operating systems and equipment; (5) implementing appropriate personnel security and integrity procedures and practices, including, but not limited to, conducting background checks consistent with applicable law; and (6) providing appropriate privacy and information security training to service provider's employees.

- b) The service provider shall execute well-defined recurring action steps that identify and monitor vulnerabilities and provide remediation or corrective measures. Where the service provider's technology or the public jurisdiction's required dependence on a third-party application to interface with the technology creates a critical or high risk, the service provider shall remediate the vulnerability as soon as possible. The service provider must ensure that applications used to interface with the service provider's technology remain operationally compatible with software updates.
- c) Upon the public jurisdiction's written request, the service provider shall provide a high-level network diagram with respect to connectivity to the public jurisdiction's network that illustrates the service provider's information technology network infrastructure.

15. Non-disclosure and Separation of Duties: The service provider shall enforce separation of job duties, require commercially reasonable non-disclosure agreements, and limit staff knowledge of public jurisdiction data to that which is absolutely necessary to perform job duties.

16. Import and Export of Data: The public jurisdiction shall have the ability to securely import, export or dispose of data in standard format in piecemeal or in entirety at its discretion without interference from the service provider. This includes the ability for the public jurisdiction to import or export data to/from other service providers identified in the contract (or in the absence of an identified format, a mutually agreeable format).

17. Responsibilities: The service provider shall be responsible for the acquisition and operation of all hardware, software and network support related to the cloud services being provided. The technical and professional activities required for establishing, managing and maintaining the environments are the responsibilities of the service provider.

18. Subcontractor Compliance: The service provider shall ensure that any of its subcontractors to whom it provides any of the personal data or non-public data it receives hereunder, or to whom it provides any personal data or non-public data which the service provider creates or receives on behalf of the public jurisdiction, agree to the restrictions, terms and conditions which apply to the service provider hereunder.

19. Right to Remove Individuals: The public jurisdiction shall have the right at any time to require that the service provider remove from interaction with public jurisdiction any

service provider representative who the public jurisdiction believes is detrimental to its working relationship with the service provider. The public jurisdiction shall provide the service provider with notice of its determination, and the reasons it requests the removal. If the public jurisdiction signifies that a potential security violation exists with respect to the request, the service provider shall immediately remove such individual. The service provider shall not assign the person to any aspect of the contract without the public jurisdiction's consent.

20. Business Continuity and Disaster Recovery: The service provider shall provide a business continuity and disaster recovery plan executive summary upon request. Lack of a plan will entitle the public jurisdiction to terminate this contract for cause.

21. Compliance with Accessibility Standards: The service provider shall comply with and adhere to Accessibility Standards of Section 508 Amendment to the Rehabilitation Act of 1973.

22. Web Services: The service provider shall use web services exclusively to interface with the public jurisdiction's data in near real time when possible.

23. Encryption of Data at Rest: The service provider shall ensure hard drive encryption consistent with validated cryptography standards as referenced in FIPS 140-2, Security Requirements for Cryptographic Modules for all personal data.

24. Subscription Terms: Service provider grants to a public jurisdiction a license to:

- a. Access and use the service for its business purposes;
- b. For SaaS, use underlying software as embodied or used in the service; and
- c. View, copy, upload, download (where applicable), and use service provider's documentation.

25. Equitable Relief: Service provider acknowledges that any breach of its covenants or obligations set forth in Addendum may cause the public jurisdiction irreparable harm for which monetary damages would not be adequate compensation and agrees that, in the event of such breach or threatened breach, the public jurisdiction is entitled to seek equitable relief, including a restraining order, injunctive relief, specific performance and any other relief that may be available from any court, in addition to any other remedy to which the public jurisdiction may be entitled at law or in equity. Such remedies shall not be deemed to be exclusive but shall be in addition to all other remedies available at law or in equity, subject to any express exclusions or limitations in this Addendum to the contrary.

AGREED:

Name of Agency: _____

Signature: _____

Title: _____

Date: _____

Name of Vendor: Casepoint, LLC

Signature:  _____

Title: Chief Revenue Officer

Date: March 5, 2025

Appendix A

(To be completed by the Agency's Procurement Officer prior to the execution of the Addendum, and shall be made a part of the Addendum. Required information not identified prior to execution of the Addendum may only be added by amending Appendix A and the Addendum, via Change Order.)

Name of Service Provider/Vendor: _____

Name of Agency: _____

Agency/public jurisdiction's required information:

1. Will restricted information be processed by the service provider?
Yes ☐
No ☐
2. If yes to #1, does the restricted information include personal data?
Yes ☐
No ☐
3. If yes to #1, does the restricted information include non-public data?
Yes ☐
No ☐
4. If yes to #1, may the service provider store public jurisdiction data in a data center in an acceptable alternative data center location, which is a country that is not the U.S.?
Yes ☐
No ☐
5. Provide name and email address for the Department privacy officer:

Name: _____

Email address: _____

Vendor/Service Provider's required information:

6. Provide name and contact information for vendor's employee who shall serve as the public jurisdiction's primary security contact:

Name: _____

Email address: _____

Phone Number: _____

EXHIBIT A – Pricing Page
eDiscovery SaaS - (OT25112)

Section	Description	Unit of Measure	Estimated Quantity	Unit Cost	Extended Cost
4.1.1	Contract Item #1: Unlimited Concurrent user license for e-discovery SaaS	LS	1.00		\$ -
4.1.2	Contract Item #2: One (1) Gigabyte Data e-Discovery SaaS usage Monthly Charge(data must rounded to the nearest whole gigabyte for billing/ auditing purposes see section 4.1.9)	EA	100.00		\$ -
4.1.7	Contract Item #3: Live individualized Agency virtual training session for up to 25 users per session (See specifications section 4.1.7 for further details)	EA	1.00		\$ -
4.1.7.4	Contract Item #4: e-Discovery SaaS access to an online knowledge base or help center.	LS	1.00		\$ -
4.1.7.5	Contract Item #5: Initial Setup and configuration of eDiscovery SaaS	LS	1.00		\$ -
4.1.7.7	Contract Item #6: e-Discovery SaaS Project Management	HR	100.00		\$ -
4.1.8	Contract Item #7: e-Discovery SaaS Technical Support	HR	100.00		\$ -
4.1.7.6	Contract Item #8: Maintenance and Support Year 1	LS	1.00		\$ -
4.1.1	Optional Renewal Year 2: Contract Item #1: Unlimited Concurrent user license for e-discovery SaaS	LS	1.00		\$ -
4.1.2	Optional Renewal Year 2: Contract Item #2: One (1) Gigabyte Data e-Discovery SaaS usage Monthly Charge(data must rounded to the nearest whole gigabyte for billing/ auditing purposes see section 4.1.9)	EA	100.00		\$ -
4.1.7	Optional Renewal Year 2:Contract Item #3: Live individualized Agency virtual training session for up to 25 users per session (See specifications section 4.1.7 for further details)	EA	1.00		\$ -
4.1.7.4	Optional Renewal Year 2: #4: e-Discovery SaaS access to an online knowledge base or help center.	LS	1.00		\$ -
4.1.7.5	Optional Renewal Year 2: Contract Item #5: Initial Setup and configuration of eDiscovery SaaS	LS	1.00		\$ -
4.1.7.7	Optional Renewal Year 2: Contract Item #6: e-Discovery SaaS Project Management	HR	100.00		\$ -
4.1.8	Optional Renewal Year 2: Contract Item #7: e-Discovery SaaS Technical Support	HR	100.00		\$ -
4.1.7.6	Optional Renewal Year 2: Contract Item #8: Maintenance and Support Year 1	LS	1.00		\$ -
4.1.1	Optional Renewal Year 3: Contract Item #1: Unlimited Concurrent user license for e-discovery SaaS	LS	1.00		\$ -
4.1.2	Optional Renewal Year 3: Contract Item #2: One (1) Gigabyte Data e-Discovery SaaS usage Monthly Charge(data must rounded to the nearest whole gigabyte for billing/ auditing purposes see section 4.1.9)	EA	100.00		\$ -
4.1.7	Optional Renewal Year 3:Contract Item #3: Live individualized Agency virtual training session for up to 25 users per session (See specifications section 4.1.7 for further details)	EA	1.00		\$ -
4.1.7.4	Optional Renewal Year 3: #4: e-Discovery SaaS access to an online knowledge base or help center.	LS	1.00		\$ -
4.1.7.5	Optional Renewal Year 3: Contract Item #5: Initial Setup and configuration of eDiscovery SaaS	LS	1.00		\$ -
4.1.7.7	Optional Renewal Year 3: Contract Item #6: e-Discovery SaaS Project Management	HR	100.00		\$ -
4.1.8	Optional Renewal Year 3: Contract Item #7: e-Discovery SaaS Technical Support	HR	100.00		\$ -
4.1.7.6	Optional Renewal Year 3: Contract Item #8: Maintenance and Support Year 1	LS	1.00		\$ -
4.1.1	Optional Renewal Year 4: Contract Item #1: Unlimited Concurrent user license for e-discovery SaaS	LS	1.00		\$ -
4.1.2	Optional Renewal Year 4: Contract Item #2: One (1) Gigabyte Data e-Discovery SaaS usage Monthly Charge(data must rounded to the nearest whole gigabyte for billing/ auditing purposes see section 4.1.9)	EA	100.00		\$ -
4.1.7	Optional Renewal Year 4:Contract Item #3: Live individualized Agency virtual training session for up to 25 users per session (See specifications section 4.1.7 for further details)	EA	1.00		\$ -
4.1.7.4	Optional Renewal Year 4: #4: e-Discovery SaaS access to an online knowledge base or help center.	LS	1.00		\$ -
4.1.7.5	Optional Renewal Year 3: Contract Item #5: Initial Setup and configuration of eDiscovery SaaS	LS	1.00		\$ -
4.1.7.7	Optional Renewal Year 4: Contract Item #6: e-Discovery SaaS Project Management	HR	100.00		\$ -
4.1.8	Optional Renewal Year 4: Contract Item #7: e-Discovery SaaS Technical Support	HR	100.00		\$ -
4.1.7.6	Optional Renewal Year 4: Contract Item #8: Maintenance and Support Year 1	LS	1.00		\$ -
Total Cost				\$	-

See Exhibit A Pricing Page Attached as a separate Excel attachment.

Please refer to Specification 5.3 for more information.

Contract will be evaluated on all lines but only awarded on first year. Renewal options for years 2, 3, and 4 will be initiated by the Agency, agreed to by the Vendor and processed by the West Virginia Purchasing Division as Change Orders for subsequent years.



Vendor Signature:

Date:



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Quote
Info Technology

Proc Folder: 1619676

Doc Description: Cybersecurity e-Discovery Software as a Service (OT25112)

Reason for Modification:

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2025-02-06	2025-02-26 13:30	CRFQ 0231 OOT2500000017	1

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VS0000020805

Vendor Name : Casepoint, LLC

Address : 1101 17th Street NW, Floor 12

Street :

City : Washington

State : DC

Country : United States

Zip : 20036

Principal Contact : Chris Kruse, Chief Revenue Officer

Vendor Contact Phone: 415-786-9471

Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

**Vendor
Signature X**

FEIN# 30-050-3533

DATE 3/5/2025

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

The West Virginia Purchasing Division is soliciting bids on behalf of West Virginia Office of Technology to establish a contract for an e-Discovery software as a service. This software will be used for discovery in legal proceedings to process emails and other files. The software will facilitate keyword searching, document review, privilege report creation, data tagging and redaction prior to final report being released per the terms and conditions and specifications as attached.

INVOICE TO

DEPARTMENT OF
ADMINISTRATION
OFFICE OF TECHNOLOGY
1900 KANAWHA BLVD E,
BLDG 5 10TH FLOOR
CHARLESTON WV
US

SHIP TO

WV OFFICE OF
TECHNOLOGY
BLDG 5, 10TH FLOOR
1900 KANAWHA BLVD E
CHARLESTON WV
US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Contract Services: e-Discovery System				

Comm Code	Manufacturer	Specification	Model #
43231511			

Extended Description:

Please see the attached Exhibit A Pricing Page

Please note: Vendor must provide Exhibit A Pricing Page with their submitted bid response. Failure to do so will result in disqualification of your bid.

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Questions are due by 3:00 p.m.	2025-02-18

	Document Phase	Document Description	Page 3
OOT2500000017	Final	Cybersecurity e-Discovery Software as a Service (OT25112)	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Quote
Info Technology

Proc Folder: 1619676

Doc Description: Addendum No 1 Cybersecurity e-Discovery SAAS (OT25112)

Reason for Modification:

Addendum No 1 is issued to
modify the bid opening date

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2025-02-24	2025-03-05 13:30	CRFQ 0231 OOT2500000017	2

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VS0000020805

Vendor Name : Casepoint, LLC

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Country : United States

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Principal Contact : Chris Kruse, Chief Revenue Officer

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Extension:

FOR INFORMATION CONTACT THE BUYER

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toby.l.welch@wv.gov

Vendor
Signature X

FEIN# 30-050-3533

DATE 3/5/2025

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ADDITIONAL INFORMATION
Addendum No 1 is issued for the following reasons: 1) 1) To modify the bid opening date from 2/26/25 to 3/5/25. --no other changes--

INVOICE TO	SHIP TO
DEPARTMENT OF ADMINISTRATION OFFICE OF TECHNOLOGY 1900 KANAWHA BLVD E, BLDG 5 10TH FLOOR CHARLESTON WV US	WV OFFICE OF TECHNOLOGY BLDG 5, 10TH FLOOR 1900 KANAWHA BLVD E CHARLESTON WV US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Contract Services: e-Discovery System				

Comm Code	Manufacturer	Specification	Model #
43231511			

Extended Description:
Please see the attached Exhibit A Pricing Page

Please note: Vendor must provide Exhibit A Pricing Page with their submitted bid response. Failure to do so will result in disqualification of your bid.

SCHEDULE OF EVENTS		
<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Questions are due by 3:00 p.m.	2025-02-18

	Document Phase	Document Description	Page 3
OOT2500000017	Final	Addendum No 1 Cybersecurity e-Discovery SAAS (OT25112	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Quote
Info Technology

Proc Folder: 1619676

Doc Description: Addendum No 2 Cybersecurity e-Discovery SAAS (OT25112)

Reason for Modification:

Addendum no 2 is issued to publish questions and answers and to modify the bid opening date.

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2025-03-03	2025-03-07 13:30	CRFQ 0231 OOT2500000017	3

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VS0000020805

Vendor Name : Casepoint, LLC

Address : 1101 17th Street NW, Floor 12

Street :

City : Washington

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Country : United States

Zip : 20036

Principal Contact : Chris Kruse, Chief Revenue Officer

Vendor Contact Phone: 415-786-9471

Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor
Signature X

FEIN# 30-050-3533

DATE 3/5/2025

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION
Addendum No 2 is issued for the following reasons: 1) To Publish Vendor questions with the Agency's responses. 2) To modify the bid opening date from 3/5/25 to 3/7/25. --no other changes--

INVOICE TO	SHIP TO
DEPARTMENT OF ADMINISTRATION OFFICE OF TECHNOLOGY 1900 KANAWHA BLVD E, BLDG 5 10TH FLOOR CHARLESTON WV US	WV OFFICE OF TECHNOLOGY BLDG 5, 10TH FLOOR 1900 KANAWHA BLVD E CHARLESTON WV US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Contract Services: e-Discovery System				

Comm Code	Manufacturer	Specification	Model #
43231511			

Extended Description:
Please see the attached Exhibit A Pricing Page

Please note: Vendor must provide Exhibit A Pricing Page with their submitted bid response. Failure to do so will result in disqualification of your bid.

SCHEDULE OF EVENTS		
<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Questions are due by 3:00 p.m.	2025-02-18

	Document Phase	Document Description	Page 3
OOT2500000017	Final	Addendum No 2 Cybersecurity e-Discovery SAAS (OT25112	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Quote
Info Technology

Proc Folder: 1619676

Doc Description: Addendum No 1 Cybersecurity e-Discovery SAAS (OT25112)

Reason for Modification:

Addendum No 1 is issued to
modify the bid opening date

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2025-02-24	2025-03-05 13:30	CRFQ 0231 OOT2500000017	2

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

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Vendor Name : Casepoint, LLC

Address : 1101 17th Street NW, Floor 12

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Zip : 20036

Principal Contact : Chris Kruse, Chief Revenue Officer

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Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor
Signature X

FEIN# 30-050-3533

DATE March 5, 2025

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

Addendum No 1 is issued for the following reasons:

1) 1) To modify the bid opening date from 2/26/25 to 3/5/25.

--no other changes--

INVOICE TO				SHIP TO			
DEPARTMENT OF ADMINISTRATION OFFICE OF TECHNOLOGY 1900 KANAWHA BLVD E, BLDG 5 10TH FLOOR CHARLESTON WV US				WV OFFICE OF TECHNOLOGY BLDG 5, 10TH FLOOR 1900 KANAWHA BLVD E CHARLESTON WV US			

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Contract Services: e-Discovery System				

Comm Code	Manufacturer	Specification	Model #
43231511			

Extended Description:

Please see the attached Exhibit A Pricing Page

Please note: Vendor must provide Exhibit A Pricing Page with their submitted bid response. Failure to do so will result in disqualification of your bid.

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Questions are due by 3:00 p.m.	2025-02-18

SOLICITATION NUMBER: CRFQ OOT2500000017

Addendum Number: 1

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- ☒ Modify bid opening date and time
- ☐ Modify specifications of product or service being sought
- ☐ Attachment of vendor questions and responses
- ☐ Attachment of pre-bid sign-in sheet
- ☐ Correction of error
- ☐ Other

Description of Modification to Solicitation:

Addendum No 1 is issued for the following reasons:

1) To modify the bid opening date from 2/26/25 to 3/5/25.

--no other changes--

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ OOT25*017

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

<input checked="" type="checkbox"/> Addendum No. 1	<input type="checkbox"/> Addendum No. 6
<input checked="" type="checkbox"/> Addendum No. 2	<input type="checkbox"/> Addendum No. 7
<input type="checkbox"/> Addendum No. 3	<input type="checkbox"/> Addendum No. 8
<input type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input type="checkbox"/> Addendum No. 5	<input type="checkbox"/> Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Casepoint, LLC

Company



Authorized Signature

March 5, 2025

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.
Revised 6/8/2012



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Quote
Info Technology

Proc Folder: 1619676

Doc Description: Addendum No 2 Cybersecurity e-Discovery SAAS (OT25112)

Reason for Modification:

Addendum no 2 is issued to publish questions and answers and to modify the bid opening date.

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2025-03-03	2025-03-07 13:30	CRFQ 0231 OOT2500000017	3

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VS0000020805

Vendor Name : Casepoint, LLC

Address : 1101 17th Street NW, Floor 12

Street :

City : Washington

State : DC

Country : United States

Zip : 20036

Principal Contact : Chris Kruse, Chief Revenue Officer

Vendor Contact Phone: 415-786-9471

Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch
(304) 558-8802
toby.l.welch@wv.gov

Vendor
Signature X

FEIN# 30-050-3533

DATE March 5, 2025

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

Addendum No 2 is issued for the following reasons:

- 1) To Publish Vendor questions with the Agency's responses.
- 2) To modify the bid opening date from 3/5/25 to 3/7/25.

--no other changes--

INVOICE TO				SHIP TO			
DEPARTMENT OF ADMINISTRATION OFFICE OF TECHNOLOGY 1900 KANAWHA BLVD E, BLDG 5 10TH FLOOR CHARLESTON WV US				WV OFFICE OF TECHNOLOGY BLDG 5, 10TH FLOOR 1900 KANAWHA BLVD E CHARLESTON WV US			

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Contract Services: e-Discovery System				

Comm Code	Manufacturer	Specification	Model #
43231511			

Extended Description:

Please see the attached Exhibit A Pricing Page

Please note: Vendor must provide Exhibit A Pricing Page with their submitted bid response. Failure to do so will result in disqualification of your bid.

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Questions are due by 3:00 p.m.	2025-02-18

SOLICITATION NUMBER: CRFQ OOT2500000017

Addendum Number: 2

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- ☒ Modify bid opening date and time
- ☐ Modify specifications of product or service being sought
- ☒ Attachment of vendor questions and responses
- ☐ Attachment of pre-bid sign-in sheet
- ☐ Correction of error
- ☐ Other

Description of Modification to Solicitation:

Addendum No 1 is issued for the following reasons:

- 1) To publish vendor's questions with their responses.
 - 2) To modify the bid opening date from 3/05/25 to 3/07/25.
- no other changes--

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ATTACHMENT A

CRFQ OOT2500000017
Cybersecurity e-Discovery Software as a Service
Vendor Questions

1. Would the Agency like to see a demonstration of platforms as part of the bid process?

That isn't a requirement with this solicitation. There is no demonstration stage. Submit all relevant information with your bid in order to fully evaluate your response.

2. We assume the Agency requires a FedRAMP moderate and StateRAMP authorized solution? Yes or No?

It would be nice to have, but it is not a mandatory requirement.

3. What is the estimated volume of data to be processed for eDiscovery (in GB/TB)?

Estimated 10TB

4. Do you need assistance with migrating data into the eDiscovery system? If so, what is the estimated data amount (in GB/TB)?

Yes we will need assistance. Estimated 10TB

5. Can you provide details on the scope for project management and technical support services? This offeror provides extensive training on the platform and assistance to users with learning how to manage cases, we assume this is what is required? 4.1.81

Yes, your assumption is correct.

6. Regarding Requirement 4.1.7.7, what does the Agency require for project management? We assume phone or training/Zoom support assisting users learning to set up their cases and projects is what the agency is asking for?

Project management encompasses planning, executing, and delivering data within case workspaces for litigation discovery. Zoom-style training will be acceptable.

7. Full 24 hour support coverage is an expensive option and rarely used, even by national law enforcement and Federal agencies. The Vendor has provided this in the past and found that, due to the self-service nature of the requirements, support request volume is generally between the following hours: Monday – Friday from 8am – 1am ET (via phone, support tickets, in-platform), and Saturday & Sunday from 9am – 1am ET (via support tickets and in-platform).

Could the Agency confirm that this is acceptable?

Those hours are acceptable.

CRFQ OOT2500000017

Cybersecurity e-Discovery Software as a Service Vendor Questions

8. Is there a current vendor supplying these services and technology?

Yes

9. Is this RFQ to supplement an existing technology platform or replace it?

This is to replace the existing platform as the contract has expired.

10. If yes, what year are they into the current agreement?

The current agreement has expired.

11. If there is a current vendor, when did they perform the initial data migration?

There was no initial data migration. Services were performed internally prior to this contract.

12. What is the current total data footprint expected in year 1?

Currently estimated 10TB but data footprint varies based on requests received for services.

13. Does your vendor either previously, currently or going forward have to have offices in the state of West Virginia? Does vendor have to have employees in the state of West Virginia?

Does not have to have offices in the state of West Virginia but must have offices in the United States.

14. 4.1.9-Can you please add clarity to the internal requirements for section 4.1.1.9, specifically a configurable Platform definition?

Allow administrator to setup platforms and matters

15. 4.1.1.10-Is there currently two petabytes of data in your current platform? Is this the amount that would need to be hosted or is this a projection?

It is estimated that we currently host 10TB of data. We don't project we will ever need two petabytes but that would be the maximum amount of data to be hosted.

16. With regard to 4.12, would the WV Office of Technology like the cost for Review, ECA and Cold Storage separately or is the WV Office of Technology solely requesting the cost per GB for Review?

This solicitation is a RFQ (Request for Quotation) This will be a single award to the lowest vendor meeting all of the mandatory specifications. Please follow the directions on how to properly fill out Exhibit A Pricing page contained with the bid documents.

CRFQ OOT2500000017

Cybersecurity e-Discovery Software as a Service

Vendor Questions

17. Is any of the data being migrated from another eDiscovery system? If so, what system?

Yes it is in another e-Discovery system. It is currently in Casepoint.

18. On WV Oasis, it lists the contract contents for the incumbent (Casepoint LLC) – however, it only lists the contract amount versus the unit amount. Would it be possible to share the unit amount?

Requesting copies of previously awarded contracts, documents, or other information related to previous contracts through the question and answer process included in this solicitation is not appropriate. That information needs can be obtained by interested parties through a Freedom Of Information Act Request

19. We intend to offer 4.1.1, 4.1.7, 4.1.7.4 and 4.1.7.5 to the WV Office of Technology for \$0, on a complimentary basis (as we customarily do not charge for these items as standard business practice and provide them inclusively) – if we enter “0” in those sections, it reverts to a “-” in the Unit Cost and Extended Cost sections of the pricing page. If a “-” is left, will it be found non-responsive? Should we add an explanation inside of our response that we are absolutely going to be providing all of these categories to the WV Office of Technology, just on a complimentary basis?

If you enter a \$0 (zero cost) item, it would be very helpful to include a notation that it is a no cost item and not a no bid item. You may also need to print off Exhibit A pricing page and manually enter the \$0 no-cost item and submit the paper version with your bid. The excel sheet may not acknowledge a zero cost.

20. For 4.1.7.7 and 4.18, is the WV Office of Technology estimating that it will need 100 hours of both Project Management and Technical Support per year?

Yes, that is correct. These are estimated hours only, and the actual usage may either be higher or lower.

21. How many internal users would the State of West Virginia need?

The number of users would vary based on agency requests for services.

22. Does the software platform need to have the ability to collect documents responsive to a public records request?

If you're referring to FOIA's yes

23. If so, what data sources would the State of West Virginia like to collect from?

Google, Microsoft is the top 2

CRFQ OOT2500000017

Cybersecurity e-Discovery Software as a Service

Vendor Questions

24. Does the software platform need the ability to review documents responsive to a public records request?

If you're referring to FOIA's yes

25. Does the State of West Virginia plan on implementing software to help with the other areas of the Electronic Discovery Reference Model (EDRM) in the future?

possibly in the future, but that is not part of this solicitation.

26. Approximately how many Legal Holds and/or E-Discovery matters are active at any time? How many custodians are on these holds?

Current data is approximately 10TB. This is approximately 15 matters.

27. Is audio or video redaction in scope?

Currently, not in scope.

28. What target date do you want the solution to be live?

Target start date is ASAP after solicitation closes and an award is made.

29. Has the budget already been allocated?

Budget information will not be provided. We encourage vendors to provide fair market pricing. The contract will be awarded to the lowest bidder meeting all mandatory specification.

30. What is the biggest challenge with your current process?

Not being able to upload straight from Google as well as download direct to Google drive

31. Do you plan on releasing a public ranking of submissions or top contenders prior to the demonstration stage?

Yes, the vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., 5-22-1 et seq., and 5G-1-1 et seq. and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq. DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE. *Furthermore, there is no demonstration stage. Submit all relevant information with your bid in order to fully evaluate your response.

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Cybersecurity e-Discovery Software as a Service
Vendor Questions

32. What legal technology is being used today to include legal hold, ECA, ESI collection, forensic collection from physical devices/remote endpoints?

FTK, AXIOM, Google Vault and Microsoft Purview

33. Does your current E-Discovery solution have the ability to preserve data in-place from your sources or does IT/3rd party preserve this data manually?

The current solution preserves the data.

34. Is tracking employee status changes, department moves, movement out of the company a challenge?

No

35. Does the State of West Virginia have an Early Case Assessment (ECA) and Collection Tool?

Yes, the built in features of Microsoft and Google

36. If no, Which data sources will you want our solution to search and collect from:
Could include Email (What version), SharePoint, One Drive, Network Shares, Laptops, Desktops, Archive (if so which ones)?

See Question No 35

37. Could you please describe the roles and responsibilities of the parties involved in the request process (e.g., Requestor, Administrator, Users/Groups, Custodians, Assistants)?

The requestor is a State employee or legal representative of a State employee. The administrators are Office of Technology employees. The requestor is also the custodian and reviewer of the data.

38. Is the Administrator the site Administrator (i.e., responsible for workflow configurations)?

Yes

39. Do the Users/Groups fulfill the role of a Request Administrator (i.e., responsible for setting due dates, and assigning workflow tasks)?

Yes

CRFQ OOT2500000017

Cybersecurity e-Discovery Software as a Service

Vendor Questions

40. Who performs the collections of data?

Currently it is Office of Technology staff

41. Who reviews the data?

Users/Groups, Custodians, Assistants and outside counsel

42. What data sources contain data that might need to be gathered to answer a Public Records Request or e-Discovery matter (email? Network file shares? Proprietary databases?)

email Google suite, Microsoft drive, Network file shares

43. What is the State currently doing for Redaction?

It's provided within the current provider's e-Discovery tool.

44. Does the State need to produce reports like the Federal Vaughan report where the specific redactions are enumerated?

Unknown

45. Would the State want to merge in-progress or completed matters from their current system to the new system? If so, in what system are the matters held currently?

Yes, all current progress matters will need to be merged. The current provider is Casepoint.

46. The RFQ does not provide instructions for addressing the mandatory requirements with a written technical response. We recommend the West Virginia Office of Technology (WVOT) include a requirement to provide a technical response to address them to ensure proposed solutions are technically acceptable.

There is no demonstration stage. Submit all relevant information with your bid in order to fully evaluate your response.

47. Will WVOT consider evaluating a technical response demonstrating compliance with these requirements?

See Question No 46

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Cybersecurity e-Discovery Software as a Service
Vendor Questions

48. Is the unlimited concurrent user license intended for a single user or for enterprise-wide use?

Enterprise wide use

49. If it is limited to a single user or per user basis, how should the vendor include enterprise licenses?

See Question No 48

50. RFQ does not currently address security requirements. Given the risk of cyber breaches, we recommend incorporating StateRAMP requirements to ensure a secure and compliant solution. Will WVOT consider evaluating the RFQ based on these requirements?

Submit all relevant information pertaining to the mandatory specifications. The Contract will be awarded to a single, lowest bidder meeting all of the requirements.

51. Will WVOT add a line item to the pricing page to address the cost of migration for transitioning to a new technology solution?

The successful bidder will not be responsible for migration.

52. Currently, the eDiscovery SaaS usage charge is priced on a monthly per GB basis. Some vendors provide a discount for subscription-based pricing (i.e. 5TBs, 10 TBs, etc.). Would WVOT be open to considering a subscription pricing model?

WVOT is not considering a subscription pricing model at this time. Please fill out Exhibit A pricing as submitted.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ OOT25*017

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

<input checked="" type="checkbox"/> Addendum No. 1	<input type="checkbox"/> Addendum No. 6
<input checked="" type="checkbox"/> Addendum No. 2	<input type="checkbox"/> Addendum No. 7
<input type="checkbox"/> Addendum No. 3	<input type="checkbox"/> Addendum No. 8
<input type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input type="checkbox"/> Addendum No. 5	<input type="checkbox"/> Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Casepoint, LLC

Company



Authorized Signature

March 5, 2025

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised 6/8/2012