



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

## Solicitation

NUMBER

HHR14029

PAGE

1

ADDRESS CORRESPONDENCE TO ATTENTION OF:

ROBERTA WAGNER  
304-558-0067

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HEALTH AND HUMAN RESOURCES

BPH ENVIRO HLTH SERVICES  
350 CAPITOL STREET, ROOM 313  
CHARLESTON, WV  
25301-1757 304-558-8582

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DATE PRINTED

10/29/2013

BID OPENING DATE:

12/05/2013

BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
THE WEST VIRGINIA PURCHASING DIVISION IS SOLICITING BIDS ON BEHALF OF THE WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF MANAGEMENT INFORMATION SERVICES (MIS) TO ESTABLISH A CONTRACT FOR THE ONE TIME PURCHASE OF A MASTER DATA MANAGEMENT (MDM) CUSTOMIZABLE OFF THE SHELF PRODUCT PER THE ATTACHED SPECIFICATIONS AND INSTRUCTIONS TO BIDDERS.						
0001	1	EA		099-00-01-001		
MDM HUB LICENSE THAT INCLUDES 1,000,000 UNCONSOLIDATED RECORDS, 10 DATA DIRECTORS, INFORMATICA OR EQUIVALENT DATA QUALITY SOFTWARE ADAPTER AND 1 IDENTITY RESOLUTION COUNTRY POPULATION OR EQUIVALENT						
0002	5,000,000	EA		099-00-01-001		
UNCONSOLIDATED CUSTOMER RECORDS						
0003	800,000	EA		099-00-01-001		
UNCONSOLIDATED BUSINESS RECORDS						
SIGNATURE						
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ADDRESS CHANGES TO BE NOTED ABOVE						

WHEN RESPONDING TO SOLICITATION, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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0004	1	EA		099-00-01-001		
				DATA QUALITY GOVERNANCE EDITION LICENSE THAT INCLUDES		
				DATA QUALITY, DATA EXPLORER, 1 BUSINESS GLOSSARY, IDENTIFY MATCH OPTION AND IDQ ACCELERATOR FOR THE US OR EQUIVALENT		
0005	1	EA		099-00-01-001		
				REAL TIME EXTRACT TRANSFORM AND LOAD (ETL) LICENSE		
				REAL TIME EXTRACT TRANSFORM AND LOAD (ETL) LICENSE		
0006	2	EA		099-00-01-001		
				MULTIPRODUCT DEVELOPMENT OR TEST		
				MULTIPRODUCT DEVELOPMENT OR TEST LICENSE OR EQUIVALENT		
0007	1	YR		099-00-01-001		
				YEAR ONE ADDRESS CLEANSING SUBSCRIPTION		

SIGNATURE

TELEPHONE

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0008	1	YR		099-00-01-001		
				YEAR TWO ADDRESS CLEANSING SUBSCRIPTION		
0009	1	YR		099-00-01-001		
				YEAR THREE ADDRESS CLEANSING SUBSCRIPTION		
0010	1	YR		099-00-01-001		
				YEAR FOUR ADDRESS CLEANSING SUBSCRIPTION		
0011	1	YR		099-00-01-001		
				YEAR ONE ANNUAL SUPPORT		
				WITH ABOVE REFERENCED PRODUCTS		
0012	1	YR		099-00-01-001		
				YEAR TWO ANNUAL SUPPORT		

SIGNATURE	WITH ABOVE REFERENCED PRODUCTS	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE	

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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0013	1	YR		099-00-01-001		
				YEAR THREE ANNUAL SUPPORT		
				WITH ABOVE REFERENCED PRODUCTS		
0014	1	YR		099-00-01-001		
				YEAR FOUR ANNUAL SUPPORT		
				WITH THE ABOVE REFENCED PRODUCTS		
0015	1	EA		099-00-01-001		
				ON-SITE INSTRUCTOR LEAD DATA STEWARD TRAININGTHAT		
				INCLUDES THE FOLLOWING TOPICS: DATA STEWARD INTERFACE		
				SEARCHING FOR DATA, DATA CLEANSING, WORKING WITH MERGE		
				CANDIDATES, VIEWING CROSS REFERENCES, VIEWING HISTORY		
				UNMERGING, HIERARCHY VIEW, SECURITY, WORKFLOW, TASKS		
				AND ACTIONS, TASK ASSIGNMENTS AND NOTIFICATIONS (UP TO		
				12 STUDENTS)		

SIGNATURE

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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0016	5	EA		099-00-01-001		
ON-SITE INSTRUCTOR LED CUSTOM DATA QUALITY FOR DATA GOVERNANCE DEVELOPERS AND DATA STEWARDS (UP TO 12 STUDENTS) FOR DATA QUALITY DEVELOPMENT AND ANALYST TOOLS. THE TRAINING IS TO INCLUDE THE FOLLOWING: DATA QUALITY DEVELOPMENT AND ANALYST TOOLS, METADATA MANAGMENT AND BUSINESS GLOSSARY ALONG WITH OVERALL DATA GOVERNANCE PRACTICES AND PROCESSES, REPORTING, DASHBOARDS AND TEMPLATES. THE DATA QUALITY DEVELOPMENT IS TO INCLUDE THE FOLLOWING TOPICS: PROFILING, CLEANSING, STANDARDIZING, DE-DUPLICATING AND CONSOLIDATING DATA, AND IDENTIFYING ANOMALIES DEVELOPING MAPPINGS AND MAPPLETS FOR USE IN PROCESSES SUCH AS DATA STANDARDIZATION, ADDRESS VALIDATION, IDENTIFYING DUPLICATE RECORDS AND CONSOLIDATION. THE DATA QUALITY ANALYST IS TO INCLUDE THE FOLLOWING TOPICS; INTRODUCING USERS TO THE ANALYST TOOL, CREATING PROJECTS, OBJECTS AND MAPPING SPECIFICATIONS, ADVANCED PROFILING OF DATA AND IDENTIFYING ANOMALIES USING TAGS AND COMMENTS, HOW TO USE PROFILING RESULTS TO BUILD REFERENCE TABLES AND SCORECARDS, AND HOW TO COLLABORATE WITH DEVELOPERS USING SHARED PROJECTS, RULES, COMMENTS AND TAGS (UP TO 12 STUDENTS)						
0017	80	EA		099-00-01-001		
CONSULTING SERVICES (HOURS) FOR INSTALLATION AND CONFIGURATION OF THE MDM SOFTWARE FOR PRODUCTION AND TESTING ENVIRONMENTS						

SIGNATURE

TELEPHONE

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## **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. **PREBID MEETING:** The item identified below shall apply to this Solicitation.
  - ☒ A pre-bid meeting will not be held prior to bid opening.
  - ☐ A **NON-MANDATORY PRE-BID** meeting will be held at the following place and time:
  
  - ☐ 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 person attending the pre-bid meeting may represent more than one Vendor.

An attendance sheet provided at the pre-bid meeting shall serve as the official document verifying attendance. The State will not accept any other form of proof or documentation to verify 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. Additionally, the person attending the pre-bid meeting should include the Vendor's E-Mail address, phone number, and Fax number on the attendance sheet. 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.

All Vendors should arrive prior to the starting time for the pre-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.

Questions submitted at least five business days prior to a scheduled pre-bid will be discussed at the pre-bid meeting if possible. 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 in order 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.

Question Submission Deadline: November 14, 2013 - end of business

Submit Questions to: Roberta A. Wagner

2019 Washington Street, East

Charleston, WV 25305

Fax: 304-558-4115

Email: [roberta.a.wagner@wv.gov](mailto:roberta.a.wagner@wv.gov)

5. **VERBAL COMMUNICATION:** Any verbal communication between the Vendor and any State personnel is not binding, including that made 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 signed and delivered by the Vendor to the Purchasing Division at the address listed below on or before the date and time of the bid opening. 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. The bid delivery address is:

Department of Administration, Purchasing Division

2019 Washington Street East

Charleston, WV 25305-0130

The bid should contain the information listed below on the face of the envelope or the bid may not be considered:

**SEALED BID**

BUYER: \_\_\_\_\_  
 SOLICITATION NO.: \_\_\_\_\_  
 BID OPENING DATE: \_\_\_\_\_  
 BID OPENING TIME: \_\_\_\_\_  
 FAX NUMBER: \_\_\_\_\_

In the event that Vendor is responding to a request for proposal, the Vendor shall submit one original technical and one original cost proposal plus \_\_\_\_\_ convenience copies of each to the Purchasing Division at the address shown above. Additionally, the Vendor should identify the bid type as either a technical or cost proposal on the face of each bid envelope submitted in response to a request for proposal as follows:

BID TYPE: ☐ Technical  
☐ Cost

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 time stamped by the official Purchasing Division time clock.

Bid Opening Date and Time: December 05, 2013 - Thursday @ 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 Acknowledgment Form, 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.
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.

**GENERAL TERMS AND CONDITIONS:**

1. **CONTRACTUAL AGREEMENT:** Issuance of a Purchase Order signed by the Purchasing Division Director, or his designee, and approved as to form by the Attorney General's office constitutes acceptance of this Contract made by and between the State of West Virginia and the Vendor. Vendor's signature on its bid 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 **"Contract"** means the binding agreement that is entered into between the State and the Vendor to provide the goods and services requested in the Solicitation.
  - 2.3 **"Director"** means the Director of the West Virginia Department of Administration, Purchasing Division.
  - 2.4 **"Purchasing Division"** means the West Virginia Department of Administration, Purchasing Division.
  - 2.5 **"Purchase Order"** 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 successful bidder and Contract holder.
  - 2.6 **"Solicitation"** means the official solicitation published by the Purchasing Division and identified by number on the first page thereof.
  - 2.7 **"State"** means the State of West Virginia and/or any of its agencies, commissions, boards, etc. as context requires.
  - 2.8 **"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:** This Contract becomes effective on \_\_\_\_\_ upon award \_\_\_\_\_ and extends for a period of \_\_\_\_\_ one (1) \_\_\_\_\_ year(s).

**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 must be submitted to the Purchasing Division Director 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. Renewal of this Contract is limited to three (3) successive one (1) year periods. Automatic renewal of this Contract is prohibited. Notwithstanding the foregoing, Purchasing Division approval is not required on agency delegated or exempt purchases. Attorney General approval may be required for vendor terms and conditions.

**Reasonable Time Extension:** At the sole discretion of the Purchasing Division Director, and with approval from the Attorney General's office (Attorney General approval is as to form only), this Contract may be extended for a reasonable time after the initial Contract term or after any renewal term as may be necessary to obtain a new contract or renew this Contract. Any reasonable time extension shall not exceed twelve (12) months. Vendor may avoid a reasonable time extension by providing the Purchasing Division Director with written notice of Vendor's desire to terminate this Contract 30 days prior to the expiration of the then current term. During any reasonable time extension period, the Vendor may terminate this Contract for any reason upon giving the Purchasing Division Director 30 days written notice. Automatic extension of this Contract is prohibited. Notwithstanding the foregoing, Purchasing Division approval is not required on agency delegated or exempt purchases, but Attorney General approval may be required.

**Release Order Limitations:** In the event that this contract permits release orders, a release order may only be issued during the time this Contract is in effect. Any release order issued within one year of the expiration of this Contract shall be effective for one year from the date the release order is issued. No release 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.

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

☐ **Other:** See attached.

4. **NOTICE TO PROCEED:** Vendor shall begin performance of this Contract immediately upon receiving notice to proceed unless otherwise instructed by the Agency. Unless otherwise specified, the fully executed Purchase Order will be considered notice to proceed

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 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.

6. **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.

7. **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 a 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.

8. **REQUIRED DOCUMENTS:** All of the items checked below must be provided to the Purchasing Division by the Vendor as specified below.

- ☐ **BID BOND:** All Vendors shall furnish a 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.
- ☐ **PERFORMANCE BOND:** The apparent successful Vendor shall provide a performance bond in the amount of . The performance bond must be issued and received by the Purchasing Division prior to Contract award. On construction contracts, the performance bond must be 100% of the Contract value.
- ☐ **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 issued and delivered to the Purchasing Division prior to Contract award.

In lieu of the Bid Bond, Performance Bond, and Labor/Material Payment 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 a bond must be of the same amount and delivered on the same schedule as the bond it replaces. A letter of credit submitted in lieu of a performance and labor/material payment bond will only be allowed for projects under \$100,000. Personal or business checks are not acceptable.

- ☐ **MAINTENANCE BOND:** The apparent successful Vendor shall provide a two (2) year maintenance bond covering the roofing system. The maintenance bond must be issued and delivered to the Purchasing Division prior to Contract award.
- ☒ **WORKERS' COMPENSATION INSURANCE:** The apparent successful Vendor shall have appropriate workers' compensation insurance and shall provide proof thereof upon request.
- ☐ **INSURANCE:** The apparent successful Vendor shall furnish proof of the following insurance prior to Contract award and shall list the state as a certificate holder:

☐ **Commercial General Liability Insurance:**  
or more.

☐ **Builders Risk Insurance:** builders risk – all risk insurance in an amount equal to 100% of the amount of the Contract.

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The apparent successful Vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award regardless of whether or not that insurance requirement is listed above.

- ☐ **LICENSE(S) / CERTIFICATIONS / PERMITS:** In addition to anything required under the Section entitled Licensing, of the General Terms and Conditions, the apparent successful Vendor shall furnish proof of the following licenses, certifications, and/or permits prior to Contract award, in a form acceptable to the Purchasing Division.

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

9. **LITIGATION BOND:** The Director reserves the right to require any Vendor that files a protest of an award to submit a litigation bond in the amount equal to one percent of the lowest bid submitted or \$5,000, whichever is greater. The entire amount of the bond shall be forfeited if the hearing officer determines that the protest was filed for frivolous or improper purpose, including but not limited to, the purpose of harassing, causing unnecessary delay, or needless expense for the Agency. All litigation bonds shall be made payable to the Purchasing Division. In lieu of a bond, the protester may submit a cashier's check or certified check payable to the Purchasing Division. Cashier's or certified checks will be deposited with and held by the State Treasurer's office. If it is determined that the protest has not been filed for frivolous or improper purpose, the bond or deposit shall be returned in its entirety.
10. **ALTERNATES:** Any model, brand, or specification listed herein 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 should 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.
11. **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.

**12. LIQUIDATED DAMAGES:** Vendor shall pay liquidated damages in the amount  
for

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.

**13. ACCEPTANCE/REJECTION:** The State may accept or reject any bid in whole, or in part. Vendor's signature on its bid signifies acceptance of the terms and conditions contained in the Solicitation and Vendor agrees to be bound by the terms of the Contract, as reflected in the Purchase Order, upon receipt.

**14. 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.

**15. COMMUNICATION LIMITATIONS:** In accordance with West Virginia Code of State Rules §148-1-6.6, 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.

**16. 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.

**17. PAYMENT:** Payment in advance is prohibited under this Contract. Payment may only be made after the delivery and acceptance of goods or services. The Vendor shall submit invoices, in arrears, to the Agency at the address on the face of the purchase order labeled "Invoice To."

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

**19. DELIVERY:** All quotations are considered freight on board destination ("F.O.B. destination") unless alternate shipping terms are clearly identified in the bid. Vendor's listing of shipping terms that contradict the shipping terms expressly required by this Solicitation may result in bid disqualification.

**20. INTEREST:** Interest attributable to late payment will only be permitted if authorized by the West Virginia Code. Presently, there is no provision in the law for interest on late payments.

**21. PREFERENCE:** Vendor Preference may only be granted upon written request and only in accordance with the West Virginia Code § 5A-3-37 and the West Virginia Code of State Rules. A Resident Vendor Certification form has been attached hereto to allow Vendor to apply for the preference. Vendor's



failure to submit the Resident Vendor Certification form with its bid will result in denial of Vendor Preference. Vendor Preference does not apply to construction projects.

22. **SMALL, WOMEN-OWNED, OR MINORITY-OWNED BUSINESSES:** For any solicitations publicly advertised for bid on or after July 1, 2012, in accordance with West Virginia Code §5A-3-37(a)(7) 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 submission of its bid to receive the preferences made available to resident vendors. Preference for a non-resident small, women-owned, or minority owned business shall be applied in accordance with W. Va. CSR § 148-22-9.
23. **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.
24. **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 cancel any purchase or Contract upon 30 days written notice to the Vendor in accordance with West Virginia Code of State Rules § 148-1-7.16.2.
25. **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 § 148-1-4.6.
26. **TIME:** Time is of the essence with regard to all matters of time and performance in this Contract.
27. **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.
28. **COMPLIANCE:** Vendor shall comply with all applicable federal, state, and local laws, regulations and ordinances. By submitting a bid, Vendors acknowledge that they have reviewed, understand, and will comply with all applicable law.
29. **PREVAILING WAGE:** On any contract for the construction of a public improvement, Vendor and any subcontractors utilized by Vendor shall pay a rate or rates of wages which shall not be less than the fair minimum rate or rates of wages (prevailing wage), as established by the West Virginia Division of Labor under West Virginia Code §§ 21-5A-1 et seq. and available at <http://www.sos.wv.gov/administrative-law/wagerates/Pages/default.aspx>. Vendor shall be responsible for ensuring compliance with prevailing wage requirements and determining when prevailing wage



requirements are applicable. The required contract provisions contained in West Virginia Code of State Rules § 42-7-3 are specifically incorporated herein by reference.

30. **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.
31. **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). **No Change shall be implemented by the Vendor until such time as the Vendor receives an approved written change order from the Purchasing Division.**
32. **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.
33. **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.
34. **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. Notwithstanding the foregoing, Purchasing Division approval may or may not be required on certain agency delegated or exempt purchases.
35. **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.
36. **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.
37. **BANKRUPTCY:** In the event the Vendor files for bankruptcy protection, the State of West Virginia may deem this Contract null and void, and terminate this Contract without notice.

**38. [RESERVED]**

**39. 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 <http://www.state.wv.us/admin/purchase/privacy/default.html>.

**40. DISCLOSURE:** Vendor's response to the Solicitation and the resulting Contract are considered public documents and will be disclosed to the public in accordance with the laws, rules, and policies governing the West Virginia Purchasing Division. Those laws include, but are not limited to, the Freedom of Information Act found in West Virginia Code § 29B-1-1 et seq.

If a Vendor considers any part of its bid to be exempt from public disclosure, Vendor must so indicate by specifically identifying the exempt information, identifying the exemption that applies, providing a detailed justification for the exemption, segregating the exempt information from the general bid information, and submitting the exempt information as part of its bid but in a segregated and clearly identifiable format. Failure to comply with the foregoing requirements will result in public disclosure of the Vendor's bid without further notice. A Vendor's act of marking all or nearly all of its bid as exempt is not sufficient to avoid disclosure and WILL NOT BE HONORED. Vendor's act of marking a bid or any part thereof as "confidential" or "proprietary" is not sufficient to avoid disclosure and WILL NOT BE HONORED. In addition, a legend or other statement indicating that all or substantially all of the bid is exempt from disclosure is not sufficient to avoid disclosure and WILL NOT BE HONORED. Vendor will be required to defend any claimed exemption for nondisclosure in the event of an administrative or judicial challenge to the State's nondisclosure. Vendor must indemnify the State for any costs incurred related to any exemptions claimed by Vendor. Any questions regarding the applicability of the various public records laws should be addressed to your own legal counsel prior to bid submission.

**41. LICENSING:** In accordance with West Virginia Code of State Rules §148-1-6.1.7, 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. 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.

**42. ANTITRUST:** In submitting a bid to, signing a contract with, or accepting a Purchase Order 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.

- 43. VENDOR CERTIFICATIONS:** By signing its bid or entering into this Contract, Vendor certifies (1) that its bid was made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, person or entity submitting a bid for the same material, supplies, equipment or services; (2) that its bid is in all respects fair and without collusion or fraud; (3) 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; and (4) that it has reviewed this RFQ in its entirety; understands the requirements, terms and conditions, and other information contained herein. Vendor's signature on its bid also affirms that neither it nor its representatives have any interest, nor shall 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.

The individual signing this bid on behalf of Vendor certifies that he or she is authorized by the Vendor to execute this bid or any documents related thereto on Vendor's behalf; that he or she is authorized to bind the Vendor in a contractual relationship; and that, to the best of his or her knowledge, the Vendor has properly registered with any State agency that may require registration.

- 44. PURCHASING CARD ACCEPTANCE:** The State of West Virginia currently utilizes a Purchasing Card program, administered under contract by a banking institution, to process payment for goods and services. The Vendor must accept the State of West Virginia's Purchasing Card for payment of all orders under this Contract unless the box below is checked.

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Vendor is not required to accept the State of West Virginia's Purchasing Card as payment for all goods and services.

- 45. 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.

- 46. 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.

**47. PURCHASING AFFIDAVIT:** In accordance with West Virginia Code § 5A-3-10a, all Vendors are required to sign, notarize, and submit the Purchasing Affidavit stating that neither the Vendor nor a related party owe a debt to the State in excess of \$1,000. The affidavit must be submitted prior to award, but should be submitted with the Vendor's bid. A copy of the Purchasing Affidavit is included herewith.

**48. ADDITIONAL AGENCY AND LOCAL GOVERNMENT USE:** This Contract may be utilized by and extends to other agencies, spending units, and political subdivisions of the State of West Virginia; county, municipal, and other local government bodies; and school districts ("Other Government Entities"). This Contract shall be extended to the aforementioned Other Government Entities on the same prices, terms, and conditions as those offered and agreed to in this Contract. If the Vendor does not wish to extend the prices, terms, and conditions of its bid and subsequent contract to the Other Government Entities, the Vendor must clearly indicate such refusal in its bid. A refusal to extend this Contract to the Other Government Entities shall not impact or influence the award of this Contract in any manner.

**49. CONFLICT OF INTEREST:** Vendor, its officers or members or employees, shall not presently have or acquire any 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.

**50. 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.requisitions@wv.gov](mailto:purchasing.requisitions@wv.gov).

**51. BACKGROUND CHECK:** In accordance with W. Va. Code § 15-2D-3, the Director of the Division of Protective Services shall require any service provider whose employees are regularly employed on the grounds or in the buildings of the Capitol complex or who have access to sensitive or critical information



to submit to a fingerprint-based state and federal background inquiry through the state repository. The service provider is responsible for any costs associated with the fingerprint-based state and federal background inquiry.

After the contract for such services has been approved, but before any such employees are permitted to be on the grounds or in the buildings of the Capitol complex or have access to sensitive or critical information, the service provider shall submit a list of all persons who will be physically present and working at the Capitol complex to the Director of the Division of Protective Services for purposes of verifying compliance with this provision.

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.

**52. 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 heath, basic oxygen, electric furnace, Bessemer or other steel making process.

The Purchasing Division Director may, in writing, authorize the use of foreign steel products if:

- a. 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
- b. 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.

**53. 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.



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**SPECIFICATIONS**

1. **PURPOSE AND SCOPE:** The West Virginia Purchasing Division is soliciting bids on behalf of the Department of Health and Human Resources, Office of Management Information Services (MIS) to establish a contract for the one time purchase of a Master Data Management (MDM) Customizable off the shelf product.
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 **“Contract Item”** means licenses for Informatica or equal, a Master Data Management Customizable off the Shelf product. The purchase will include installation services by the vendor and four (4) years of support for all installations of the software on all of the servers.
  - 2.2 **“Pricing Page”** means the pages upon which Vendor should list its proposed price for the Contract Items in the manner requested. The Pricing Page is either included on the last page of this RFQ or attached hereto as Exhibit A.
  - 2.3 **“RFQ”** means the official request for quotation published by the Purchasing Division and identified as HHR14029
3. **GENERAL REQUIREMENTS:** The solution must provide the following required functionality as a proven and integrated suite of products. The required functionalities include:
  - 3.1 **Mandatory Contract Item Requirements:** Contract Item must meet or exceed the mandatory requirements listed below.
    - 3.1.1 Master Data Repository, including management of master data definition/metadata, master data instances and master data history, through a persistent “master record”.
      - 3.1.1.1 The solution must contain a persistent repository to store master client records and associated information including:
        - 3.1.1.1.1 Instance master data
        - 3.1.1.1.2 Definition master data
        - 3.1.1.1.3 History Data
        - 3.1.1.1.4 Metadata

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**3.1.1.2** The solution must provide a proven data model:

**3.1.1.2.1** All data elements in the model can be physically implemented as present in the model.

**3.1.1.2.2** Business rules can be applied to all data elements.

**3.1.1.2.3** All elements can be exposed via configurable services.

**3.1.1.3** The solution must provide an extensible data model where additional entity types can be user-defined.

**3.1.1.3.1** New entities can be created with data elements and relationships to existing entities.

**3.1.1.3.2** Content can be added to all data elements.

**3.1.1.3.3** Business rules can be applied to all data elements.

**3.1.1.3.4** All data elements can be exposed via configurable services.

**3.1.1.4** Multiple Master Domain Support – The solution must support multiple master data domains simultaneously, including client, vendors/provider, services, health plans, benefits, chart of accounts and location with scalability for additional master data domains.

**3.1.1.5** The solution must uniquely identify a client using business defined rules.

**3.1.1.6** The solution must assign an enterprise-wide unique identifier to a master record.

**3.1.1.7** The solution must record the mapping of the unique record Identifier with the unique ID of each of the source systems.

**3.1.1.8** The solution must record the source for each element in each record in the repository. The source must include the source system ID as well as the unique records identifier within the source system.

**3.1.1.9** The solution must provide a graphical user interface to create and configure entity lifecycle management services to read, add update

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and delete master records.

**3.1.1.10** The solution must provide Data quality management and data stewardship.

**3.1.1.11** The solution must provide the functionality to modify the name and address standardization algorithms through a graphical user interface.

**3.1.1.12** The solution must be able to identify duplicate master data records using pre-defined matching algorithms.

**3.1.1.13** The solution must provide a graphical user interface to define rules for matching and merging of data.

**3.1.1.14** The solution must provide a graphical user interface for viewing a list of suspected duplicate master records, based on the search parameters that includes the following:

**3.1.1.14.1** Source records and all suspected duplicates for those records.

**3.1.1.14.2** Indication if system matching rules detected a best match.

**3.1.1.14.3** Indication if match scores are above a user-defined threshold.

**3.1.1.14.4** The solution must provide a graphical user interface to flag the records for workflow that includes:

**3.1.1.14.3.1** Marking and unmarking suspected duplicates;

**3.1.1.14.3.2** Manually marking records as suspected duplicates; and

**3.1.1.14.3.3** Removing the suspected duplicate marking.

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- 3.1.1.15** The solution must include a graphical user interface to:
  - 3.1.1.15.1** Merge two or more records into a single record;
  - 3.1.1.15.2** Unmerge previously-merged records;
  - 3.1.1.15.3** Maintain full traceability of the source records with a complete audit trail.
- 3.1.1.16** The solution must include a graphical user interface to indicate a preferred source for a specific data element, such that data from that source takes priority over data from other sources.
- 3.1.1.17** The solution must provide a graphical user interface to add, modify and delete validation rules for specific data elements maintained in the repository. Types of validation rules that can be added, modified and deleted must include the following:
  - 3.1.1.17.1** Data element formats;
  - 3.1.1.17.2** Data element consistency validations;
  - 3.1.1.17.3** Checks on minimum and maximum permissible length;
  - 3.1.1.17.4** Conditional validation rules.
- 3.1.1.18** The solution must apply validation rules to all data inserted and updated into the repository at the time of insertion or update.
- 3.1.1.19** The solution must ensure that an address is a valid delivery address according to the United States Postal Service.
- 3.1.1.20** The solution must maintain multiple records on the same data element if the data element is provided from different source systems.
- 3.1.1.21** The solution must support on line real time input from the source systems with minimal impact on performance for the MDM or the source systems.
- 3.1.1.22** The solution must interface real time with all department on line systems that are used to provide matching and clearance processes for applicants, clients, recipients, vendors and service providers.

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- 3.1.1.23** The solution must provide a graphical user interface for the Data Stewards.
- 3.1.1.24** The solution must provide a configurable user interface.
- 3.1.1.25** The solution must provide a point and click user interface to create and configure business logic and workflow.
- 3.1.1.26** The solution must provide a user interface that permits the configuration of validation rules, merge and matching rules, notification rules, cross referencing, audit trail history, data elements and data entity relationships.
- 3.1.1.27** The solution must provide a user interface to add, modify, delete and query all data.
- 3.1.1.28** The solution must provide the ability for the Data Stewards to add entities and reconfigure relationships through a graphical user interface.
- 3.1.1.29** The solution must provide the ability through the user interface to see raw data, including data type and column attributes.
- 3.1.1.30** The solution must be able to provide on the graphical user interface, a visual presentation of data through graphs and score cards to monitor data quality.
- 3.1.1.31** The solution must provide a visual representation on the graphical user interface of data that allows for trend analysis of the data quality within and across data sources.
- 3.1.1.32** The solution must provide a visual view within the user interface to dashboard metadata for quality and accuracy.
- 3.1.1.33** The solution must provide within the user interface the capability to perform a side by side comparison of data from one or more sources for the Data Stewards.
- 3.1.1.34** The solution must provide within the user interface, a change history accessible through both a tabular format and entity diagrams with the capability to move through the change history via a graphical timeline.
- 3.1.1.35** The solution must display within the user interface household composition and client relationships through both a tabular format and an entity diagram with the capability to add, modify

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or delete data via the diagram.

**3.1.1.36** The user interface must employ icons and visual cues to enhance system usability.

**3.1.1.37** The solution must provide within the user interface, visual cues, flags and alerts based on the business and validation rules.

**3.1.1.38** The solution must provide within the user interface familiar drop down lists, tree and tab navigation.

**3.1.1.39** The solution's Master Data Management hub must have the ability to visualize relationships amongst entities beyond individuals and organizations.

**3.1.1.40** The vendor must provide a license for the MDM Hub that Includes 1,000,000 Unconsolidated Records, 10 Data Directors, Informatica or equivalent Data Quality Software Adapter and 1 Identity Resolution Country Population or Equivalent.

**3.1.1.41** The solution must process at a minimum 5,000,000 unconsolidated customer records.

**3.1.1.42** The solution must process at a minimum 800,000 unconsolidated business records.

## **3.2 Integration**

**3.2.1** The solution must provide for authoring, including master data entity definition, master data authoring and master data relationships and groupings authoring.

**3.2.2** The solution must provide master data event management, including event or time based business rules.

**3.2.3** The solution must provide for event or time bases business rules.

**3.2.4** The solution must provide the functionality for data governance at the source system level and entire MDM.

**3.2.5** The solution must provide the functionality for policy management.



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- 3.2.6** The solution must provide notification functionality to Data Stewards and the source system for defined events.
- 3.2.7** The solution must provide a configurable workflow graphical user Interface to specify the tasks for handling data management processes. This must include the ability to specify manual and automated tasks.
- 3.2.8** The solution must implement the following workflows:  
notifying data stewards of possible duplicates, tracking approval of resolution, propagating changes to master records and scheduled processes to detect duplicates.
- 3.2.9** The solution must trigger workflows by configurable master data event, configurable schedule and user requests.
- 3.2.10** For each execution of a workflow, the Solution must record, at a minimum, the following execution logging for all transactions including:
- 3.2.10.1** Start time;
  - 3.2.10.2** End time;
  - 3.2.10.3** Result;
  - 3.2.10.4** Error;
  - 3.2.10.5** User logon account;
  - 3.2.10.6** System or process identifier.
- 3.2.11** The solution must be capable of importing an existing industry standard or enterprise data model.
- 3.2.12** The solution must provide a configurable Data Steward User Interface via a web browser that does not require configuration by a programmer or developer.
- 3.2.13** The vendor must provide the license for Data Quality Governance Edition that includes Data Quality, Data Explorer, 1 Business Glossary, Identify Match Option and IDQ Accelerator for the US or Equivalent.

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### **3.3 Identity Matching and Identity Resolution**

**3.3.1** The solution must support a combination of the listed matching techniques with each able to address a particular class of data matching:

**3.3.1.1** Fuzzy matching;

**3.3.1.2** Phonetic matching;

**3.3.1.3** Deterministic matching;

**3.3.1.4** Probabilistic matching;

**3.3.1.5** Heuristic matching;

**3.3.1.6** Linguistic matching;

**3.3.1.7** Empirical matching.

**3.3.2** The solution must provide the matching and search capability that is available through a web service with a graphical user interface.

**3.3.3** The solution must be capable of modeling complex business to business and business to consumer hierarchies along with the definitions of those master data entities within the same MDM platform.

**3.3.4** The solution platform must automatically generate changes to the Service Oriented Architecture (SOA) services whenever the data model is updated with new attributes, entities or sources.

**3.3.5** The solution must synchronize master data with both operational and analytical applications to support real time business processes and reporting across multiple bureaus.

**3.3.6** The solution must provide for centralized data cleansing within the MDM.

**3.3.7** The solution's MDM hub must support a diverse set of technical requirements and a hub that requires less modification to the source systems.

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**3.3.8** The solution must have the ability to execute identity matches on line real time and return the results to the requesting source system with minimal impact to the work flow of the requesting system or MDM.

**3.3.9** The solution must have the ability to exempt an individual or a specific data element from matching that is dependent on the source system specifications or business rules.

**3.3.10** The Data Quality Governance Edition that includes Data Quality, Data Explorer, 1 Business Glossary, Identify Match Option and IDQ Accelerator for the US or Equivalent.

#### **3.4 Security**

**3.4.1** The Solution must implement secure interfaces, including dedicated and encrypted links to source applications (Db2 on the DHHR Mainframe, PowerBuilder on ORACLE, Microsoft.net on ORACLE, Java on the DHHR Mainframe, and Access on SQL Server.

**3.4.2** The solution must support client certificates for authentication.

**3.4.3** The solution must support strong password functionality that can be configured by the system administrator including the following:

**3.4.3.1** Length of the password;

**3.4.3.2** Types and number of characters required (numbers, symbols, uppercase letters, and lowercase letters);

**3.4.3.3** Password change interval in days;

**3.4.3.4** User password expiration notification in days.

**3.4.4** The solution must provide role-based security and functionality to establish user roles through a graphical user interface.

**3.4.5** The solution must use an established method of data security through strong encryption, minimum of 128-bit, in all external communication.

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- 3.4.6 The solution must monitor and report any unauthorized access attempts to the system administrator.
- 3.4.7 The solution must store all passwords in an industry standard encrypted format.
- 3.4.8 The solution must provide for the protection of individuals or data identified confidential or sensitive by the source system or data governance rules.
- 3.4.9 The solution must control access in a fine grained manner that supports row and attribute level security.
- 3.4.10 The solution must automatically alert data managers and system administrators of any attempted breaches or security or query anomalies.
- 3.4.11 The solution must provide an administrative user role that has the capability to reset passwords, modify user status, authority to restrict user account access by system function (query, export, report, etc.) and authority to configure the strong password functionality parameters.
- 3.4.12 The solution must not use schema owner or other privileged user to connect to the database.
- 3.4.13 The solution must use least privilege to connect to the database.
- 3.4.14 The solution must prevent the user utilized to connect to the database from being the same user connecting to the database for other administrative processes.
- 3.4.15 The solution must have been subjected to a Security Audit within the past 3 years and from that audit received a passing rating.

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- 3.4.16 The solution must not allow any SQL, either static or dynamic, executed on any web page.

### 3.5 Auditing

- 3.5.1 The solution must record and maintain a full audit trail of all changes and deletions to the master record including:
- 3.5.1.1 Record that the master record was changed or deleted;
  - 3.5.1.2 Record the name of the individual or system that is the source of the change or deletion;
  - 3.5.1.3 The date and time of the change or deletion.
- 3.5.2 The solution must record the reason for the change in an Audit Trail when the master record is updated manually.
- 3.5.4 The solution must record and maintain a full audit trail of queries to the master record that includes the record queried, the name of the individual or system that is the source of the query and the date/time of the query.
- 3.5.5 The solution must retain all previous versions of master data either on-line or through archiving process.
- 3.5.6 The solution must provide a graphical user interface to roll back to any previous version of a master data record.
- 3.5.7 The solution must enforce access rights at the attribute level.
- 3.5.8 The solution must provide a graphical user interface to configure and manage security and access rights.
- 3.5.9 The solution must maintain a record of all failed queries and include at a minimum the date, name of the person executing the query and the reason for failure.

### 3.6 Reporting

- 3.6.1 The solution must provide an integrated reporting environment.
- 3.6.2 The solution's integrated reporting environment must include pre-

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packaged reporting functions for the following data:

- 3.6.2.1 System performance;
- 3.6.2.2 Data quality;
- 3.6.2.3 Scheduling;
- 3.6.2.4 Exception conditions;
- 3.6.2.5 Workflow activity status;
- 3.6.2.6 Users and usage;
- 3.6.2.7 Audit trail.

- 3.6.3 The Solution must enable a user to execute reports through the graphical user interface.
- 3.6.4 The solution must be able to export data to Microsoft Word 2007 and 2010 and Microsoft Excel 2007 and 2010 format.
- 3.6.5 The solution must interface with the WV DHHR existing data warehouse Business Intelligence tool, COGNOS.
- 3.6.6 The solution must provide for multiple levels of data archiving, including but not limited to: automated archive of all records, automated archive or specific data while maintaining current data on line, automated and manual archive retrieval with full restoration of archived data and the capability to return data to archive manually or automatically.

### 3.7 System Management

- 3.7.1 Solution must provide Application Programming Interfaces (API) – Create, Read, Update and Delete (CRUD) services must be available via common application programming interfaces including:
  - 3.7.1.1 Native Java API for data access, extension and customization;
  - 3.7.1.2 Remote access API via Web Services Interoperability (WS-I) Basic Profile 1.0/1.1 and WS-I Security Profile 1.0 compliant web services;
  - 3.7.1.3 Remote access API via Microsoft .NET 3.5 or higher interface.
- 3.7.2 The Solution must be able to exchange messages with common middleware environments, such as Software AG's Entire X and



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IBM's MQSeries, in both asynchronous and synchronous modes, using WS-I Basic Profile 1.0/1.1 and WS-I Security Profile 1.0 compliant web services.

**3.7.3** The Solution must synchronize master records with source systems, using a transactional approach in real time and batch processing and must include the following:

**3.7.3.1** This must include file system-based publish and subscribe supported by the following formats: csv and xml;

**3.7.3.2** Messaging based publish and subscribe;

**3.7.3.3** Point to point.

**3.8 Software/Architect Requirements**

**3.8.1** The solution must support configuration allowing independence from the underlying hardware architecture that allows for proven upgrade paths to new versions.

**3.8.2** The solution will preserve and protect installation specific configuration items across upgrades to the Solution including Help Screens, content, metadata, connectors, and application integration capabilities.

**3.8.3** The Solution must deliver, enable and support a component-based deployment approach.

**3.8.4** The Solution must be able to operate in the existing infrastructure environment for the WV DHHR.

**3.8.5** The solution must enable the implementation of an n-tier architecture design to divide the system into loosely-coupled service tiers.

**3.8.6** The Solution must enable the deployment of individual components on separate hardware platforms as may be required to support scalability

**3.8.7** The Solution must support authentication through each of the following protocols and mechanisms: Lightweight Directory Access Protocol (LDAP) v3, Active Directory or other messaging systems.

**3.8.8** The Solution must make use of Simple Mail Transfer Protocol (SMTP) compliant e-mail systems for the forwarding of notifications.

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- 3.8.9** The solution must be compatible with the existing DHHR and West Virginia Office of Technology information technology environment.
- 3.8.10** The Software Solution must be scalable so that it will continue to function as data sets change in size and as additional domains are managed as master data. Scalability capabilities must include:
- 3.8.10.1** Utilization of load sharing capability as provided by the underlying technical infrastructure;
  - 3.8.10.2** Utilization of system virtualization capability as provided by the underlying technical infrastructure;
  - 3.8.10.3** Processing of operations in parallel on a single and/or multiple hosts as necessary;
  - 3.8.10.4** Real time and batch data input from multiple source systems simultaneously.

**3.9 Consulting Services and Training**

- 3.9.1** The Vendor must provide on-site Instructor Led Training Days (up to 12 students) for data stewards and business analysts that includes the following topics: Data Steward Interface, Searching for Data, Data Cleansing, Working with Merge Candidates, Viewing Cross References, Viewing History, Unmerging, Hierarchy View, Security, Workflow, Tasks and Actions, Task Assignments and Notifications.
- 3.9.2** The Vendor must provide Consulting Services for installation and configuration of the MDM software for the Production and Testing Environments.
- 3.9.3** The Vendor must provide on-site Instructor Led Training Days (up to 12 students) for Custom Data Quality for Data Governance Developers and Data Stewards for Data Quality Development and Analyst Tools. The training is to include the following: Data Quality Development and Analyst tools, Metadata Management and Business Glossary along with overall Data Governance Practices and Processes, Reporting, Dashboards and Templates. The Data Quality Development is to include the following topics: Profiling, Cleansing, Standardizing, De-duplicating and consolidating data, and identifying anomalies, Developing Mappings and Mapplets for use in processes such as data standardization, address validation, identifying duplicate records and consolidation. The Data Quality

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Analyst is to include the following topics; Introducing users to the Analyst Tool, Creating Projects, Objects and Mapping Specifications, Advanced Profiling of Data and Identifying Anomalies using tags and comments, How to use Profiling Results to Build Reference Tables and Scorecards, and How to Collaborate with Developers using Shared Projects, Rules, Comments and Tags.

### **3.10 Licenses and Subscriptions**

**3.10.1** The vendor must provide one license for an MDM Hub that includes 1,000,000 Unconsolidated Records, 10 Data Directors, Infomatica or equivalent Data Quality Software Adapter and 1 Identity Resolution Country Population or Equivalent.

**3.10.1.1** The vendor must provide 5,000,000 additional unconsolidated customer records.

**3.10.1.2** The vendor must provide 800,000 additional unconsolidated business records.

**3.10.2** The vendor must provide one license for the Data Quality Governance Edition that includes Data Quality, Data Explorer, 1 Business Glossary, Identify Match Option and IDQ Accelerator for the US or Equivalent.

**3.10.3** The vendor must provide one license for a Real Time Extract Transform and Load (ETL).

**3.10.4** The vendor must provide two licenses for the Multiproduct Development or Test Licenses or Equivalent.

**3.10.5** The vendor must provide 4 years of an address cleansing subscription.

**3.10.6** The vendor must provide 4 years of annual support for the products requested in this RFQ.

## **4. CONTRACT AWARD:**

**4.1 Contract Award:** The Contract is intended to provide Agencies with a purchase price for the Contract Items. The Contract shall be awarded to the Vendor that provides the Contract Items meeting the required specifications for the lowest grand total cost as shown on the Pricing Pages.

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**4.2 Pricing Page:** Vendor should complete the Pricing Page by completing the unit price multiplied by quantity to acquire the extended price. Then total out the extended price to come to the grand total amount. 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.

Notwithstanding the foregoing, the Purchasing Division may correct errors as it deems appropriate. Vendor should type or electronically enter the information into the Pricing Page to prevent errors in the evaluation.

**5. PAYMENT:**

**5.1 Payment:** Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia.

**6. DELIVERY AND RETURN:**

**6.1 Shipment and Delivery:** Vendor shall ship the Contract Items immediately after being awarded this Contract and receiving a purchase order or notice to proceed. Vendor shall deliver the Contract Items within 30 working days after receiving a purchase order or notice to proceed. Contract Items must be delivered to Agency at the Office of Management Information Services  
One Davis Square  
321 Capitol Street Suite 200  
Charleston, WV 25301

**6.2 Late Delivery:** The Agency placing the order under this Contract must be notified in writing if the shipment of the Contract Items will be delayed for any reason. Any delay in delivery that could cause harm to an Agency will be grounds for cancellation of the Contract, and/or obtaining the Contract Items from a third party.

Any Agency seeking to obtain the Contract Items from a third party under this provision must first obtain approval of the Purchasing Division.

**6.3 Delivery Payment/Risk of Loss:** Vendor shall deliver the Contract Items F.O.B. destination to the Agency's location.

**6.4 Return of Unacceptable Items:** If the Agency deems the Contract Items to be unacceptable, the Contract Items shall be returned to Vendor at Vendor's expense and with no restocking charge. Vendor shall either make arrangements for the return within five (5) days of being notified that items are unacceptable, or permit the Agency to arrange for the return and reimburse Agency for delivery expenses.

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If the original packaging cannot be utilized for the return, Vendor will supply the Agency with appropriate return packaging upon request. All returns of unacceptable items shall be F.O.B. the Agency's location. The returned product shall either be replaced, or the Agency shall receive a full credit or refund for the purchase price, at the Agency's discretion.

- 6.5 Return Due to Agency Error:** Items ordered in error by the Agency will be returned for credit within 30 days of receipt, F.O.B. Vendor's location. Vendor shall not charge a restocking fee if returned products are in a resalable condition. Items shall be deemed to be in a resalable condition if they are unused and in the original packaging. Any restocking fee for items not in a resalable condition shall be the lower of the Vendor's customary restocking fee or 5% of the total invoiced value of the returned items.

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**EXHIBIT A**

<b>Quantity</b>	<b>Description</b>	<b>Unit Price</b>	<b>Extended Price</b>
1	MDM Hub License that includes 1,000,000 Unconsolidated Records, 10 Data Directors, Infomatica or equivalent Data Quality Software Adapter and 1 Identity Resolution Country Population or Equivalent	\$	\$
5,000,000	Unconsolidated Customer Records	Per Record \$	\$
800,000	Unconsolidated Business Records	Per Record \$	\$
1	Data Quality Governance Edition License that includes Data Quality, Data Explorer, 1 Business Glossary, Identify Match Option and IDQ Accelerator for the US or Equivalent	\$	\$
1	Real Time Extract Transform and Load (ETL) License	\$	\$
2	Multiproduct Development or Test Licenses or Equivalent	\$	\$
1	Year 1 Address Cleansing Subscription	\$	\$
1	Year 2 Address Cleansing Subscription	\$	\$
1	Year 3 Address Cleansing Subscription	\$	\$



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1	Year 4 Address Cleansing Subscription	\$	\$
1	Year 1 Total Annual Support with above referenced products	\$	\$
1	Year 2 Total Annual Support with above referenced products	\$	\$
1	Year 3 Total Annual Support with above referenced products	\$	\$
1	Year 4 Total Annual Support with above referenced products	\$	\$
1 Day	<p>On-site Instructor Lead Data Steward Training that includes the following topics: Data Steward Interface, Searching for Data, Data Cleansing, Working with Merge Candidates, Viewing Cross References, Viewing History, Unmerging, Hierarchy View, Security, Workflow, Tasks and Actions, Task Assignments and Notifications (up to 12 students)</p>	<p>Per Day</p> <p>\$</p>	\$

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5 Days	On-site Instructor Led Custom Data Quality for Data Governance Developers and Data Stewards (up to 12 students) for Data Quality Development and Analyst Tools. The training is to include the following: Data Quality Development and Analyst tools, Metadata Management and Business Glossary along with overall Data Governance Practices and Processes, Reporting, Dashboards and Templates. The Data Quality Development is to include the following topics: Profiling, cleansing, standardizing, de-duplicating and consolidating data, and identifying anomalies, developing mappings and mapplets for use in processes such as data standardization, address validation, identifying duplicate records and consolidation. The Data Quality Analyst is to include the following topics; Introducing users to the Analyst Tool, Creating Projects, Objects and Mapping Specifications, Advanced Profiling of Data and Identifying Anomalies using tags and comments, How to use Profiling Results to Build Reference Tables and Scorecards, and How to Collaborate with Developers using Shared Projects, Rules, Comments and Tags (up to 12 students)	Per Day \$	\$
80 Hours	Consulting Services (hours) for Installation and Configuration of the MDM software for Production and Testing Environments	Per Hour \$	\$
<b>Grand Total</b>			\$

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Vendor Name: \_\_\_\_\_

Vendor Address: \_\_\_\_\_  
\_\_\_\_\_

Remit to Address: \_\_\_\_\_  
\_\_\_\_\_

Phone #: \_\_\_\_\_

Fax #: \_\_\_\_\_

E-mail: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**\*\*Award will be made to the Vendor with the lowest grand total meeting specifications.\*\***

**CERTIFICATION AND SIGNATURE PAGE**

By signing below, I certify that I have reviewed this Solicitation in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this bid or proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

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(Company)

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(Authorized Signature)

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(Representative Name, Title)

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(Phone Number)

(Fax Number)

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(Date)

**AGREEMENT ADDENDUM FOR SOFTWARE**

In the event of conflict between this addendum and the agreement, this addendum shall control:

1. **DISPUTES** - Any references in the agreement to arbitration or to the jurisdiction of any court are hereby deleted. Disputes arising out of the agreement shall be presented to the West Virginia Court of Claims.
2. **HOLD HARMLESS** - Any provision requiring the Agency to indemnify or hold harmless any party is hereby deleted in its entirety.
3. **GOVERNING LAW** - The agreement shall be governed by the laws of the State of West Virginia. This provision replaces any references to any other State's governing law.
4. **TAXES** - Provisions in the agreement requiring the Agency to pay taxes are deleted. As a State entity, the Agency is exempt from Federal, State, and local taxes and will not pay taxes for any Vendor including individuals, nor will the Agency file any tax returns or reports on behalf of Vendor or any other party.
5. **PAYMENT** - Any references to prepayment are deleted. Fees for software licenses, subscriptions, or maintenance are payable annually in advance. Payment for services will be in arrears.
6. **INTEREST** - Any provision for interest or charges on late payments is deleted. The Agency has no statutory authority to pay interest or late fees.
7. **NO WAIVER** - Any language in the agreement requiring the Agency to waive any rights, claims or defenses is hereby deleted.
8. **FISCAL YEAR FUNDING** - Service performed under the agreement may be continued in succeeding fiscal years for the term of the agreement, contingent upon funds being appropriated by the Legislature or otherwise being available for this service. In the event funds are not appropriated or otherwise available for this service, the agreement shall terminate without penalty on June 30. After that date, the agreement becomes of no effect and is null and void. However, the Agency agrees to use its best efforts to have the amounts contemplated under the agreement included in its budget. Non-appropriation or non-funding shall not be considered an event of default.
9. **STATUTE OF LIMITATION** - Any clauses limiting the time in which the Agency may bring suit against the Vendor, lessor, individual, or any other party are deleted.
10. **SIMILAR SERVICES** - Any provisions limiting the Agency's right to obtain similar services or equipment in the event of default or non-funding during the term of the agreement are hereby deleted.
11. **FEES OR COSTS** - The Agency recognizes an obligation to pay attorney's fees or costs only when assessed by a court of competent jurisdiction. Any other provision is invalid and considered null and void.
12. **ASSIGNMENT** - Notwithstanding any clause to the contrary, the Agency reserves the right to assign the agreement to another State of West Virginia agency, board or commission upon thirty (30) days written notice to the Vendor and Vendor shall obtain the written consent of Agency prior to assigning the agreement.
13. **LIMITATION OF LIABILITY** - The Agency, as a State entity, cannot agree to assume the potential liability of a Vendor. Accordingly, any provision in the agreement limiting the Vendor's liability for direct damages is hereby deleted. Vendor's liability under the agreement shall not exceed three times the total value of the agreement. Limitations on special, incidental or consequential damages are acceptable. In addition, any limitation is null and void to the extent that it precludes any action for injury to persons or for damages to personal property.
14. **RIGHT TO TERMINATE** - Agency shall have the right to terminate the agreement upon thirty (30) days written notice to Vendor. Agency agrees to pay Vendor for services rendered or goods received prior to the effective date of termination. In such event, Agency will not be entitled to a refund of any software license, subscription or maintenance fees paid.
15. **TERMINATION CHARGES** - Any provision requiring the Agency to pay a fixed amount or liquidated damages upon termination of the agreement is hereby deleted. The Agency may only agree to reimburse a Vendor for actual costs incurred or losses sustained during the current fiscal year due to wrongful termination by the Agency prior to the end of any current agreement term.
16. **RENEWAL** - Any reference to automatic renewal is deleted. The agreement may be renewed only upon mutual written agreement of the parties.
17. **INSURANCE** - Any provision requiring the Agency to purchase insurance for Vendor's property is deleted. The State of West Virginia is insured through the Board of Risk and Insurance Management, and will provide a certificate of property insurance upon request.
18. **RIGHT TO NOTICE** - Any provision for repossession of equipment without notice is hereby deleted. However, the Agency does recognize a right of repossession with notice.
19. **ACCELERATION** - Any reference to acceleration of payments in the event of default or non-funding is hereby deleted.
20. **CONFIDENTIALITY** - Any provision regarding confidentiality of the terms and conditions of the agreement is hereby deleted. State contracts are public records under the West Virginia Freedom of Information Act.
21. **AMENDMENTS** - All amendments, modifications, alterations or changes to the agreement shall be in writing and signed by both parties. No amendment, modification, alteration or change may be made to this addendum without the express written approval of the Purchasing Division and the Attorney General.

**ACCEPTED BY:****STATE OF WEST VIRGINIA****VENDOR**

Spending Unit: \_\_\_\_\_

Company Name: \_\_\_\_\_

Signed: \_\_\_\_\_

Signed: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Attachment

PO#: HHR14029

This agreement constitutes the entire agreement between the parties, and there are no other terms and conditions applicable to the licenses granted hereunder.

Agreed

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Signature                      Date

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Title

---

Company Name

---

Signature                      Date

---

Title

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Agency/Division



# State of West Virginia

## VENDOR PREFERENCE CERTIFICATE

Certification and application\* is hereby made for Preference in accordance with **West Virginia Code**, §5A-3-37. (Does not apply to construction contracts). **West Virginia Code**, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the **West Virginia Code**. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1. **Application is made for 2.5% resident vendor preference for the reason checked:**  
☐ Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,  
☐ Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or** 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,  
☐ Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or**,
2. **Application is made for 2.5% resident vendor preference for the reason checked:**  
☐ Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,
3. **Application is made for 2.5% resident vendor preference for the reason checked:**  
☐ Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,
4. **Application is made for 5% resident vendor preference for the reason checked:**  
☐ Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or**,
5. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**  
☐ Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or**,
6. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**  
☐ Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.
7. **Application is made for preference as a non-resident small, women- and minority-owned business, in accordance with West Virginia Code §5A-3-59 and West Virginia Code of State Rules.**  
☐ Bidder has been or expects to be approved prior to contract award by the Purchasing Division as a certified small, women- and minority-owned business.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

**Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.**

Bidder: \_\_\_\_\_ Signed: \_\_\_\_\_  
 Date: \_\_\_\_\_ Title: \_\_\_\_\_

RFQ No. HHR14029

STATE OF WEST VIRGINIA  
Purchasing Division

## PURCHASING AFFIDAVIT

**MANDATE:** Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

**EXCEPTION:** The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

**DEFINITIONS:**

**"Debt"** means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

**"Employer default"** means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

**"Related party"** means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

**AFFIRMATION:** By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

**WITNESS THE FOLLOWING SIGNATURE:**

Vendor's Name: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

State of \_\_\_\_\_

County of \_\_\_\_\_, to-wit:

Taken, subscribed, and sworn to before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

My Commission expires \_\_\_\_\_, 20\_\_.

**AFFIX SEAL HERE**

**NOTARY PUBLIC** \_\_\_\_\_

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: HHR14029**

**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 type="checkbox"/> Addendum No. 1	<input type="checkbox"/> Addendum No. 6
<input 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.

\_\_\_\_\_  
Company

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

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