

**CONSENT AGENDA  
OCTOBER 22, 2015**

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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
1	<b>BAHR – SECTION II – EDNETICS, INC. TELEPHONE SYSTEMS UPGRADE CONTRACT</b>	Action Item
2	<b>IRSA – IDAHO EPSCoR COMMITTEE APPOINTMENTS</b>	Action Item
3	<b>PPGA – INDIAN EDUCATION COMMITTEE APPOINTMENTS</b>	Action Item
4	<b>PPGA – STATE REHABILITATION COUNCIL APPOINTMENTS</b>	Action Item
5	<b>PPGA – DATA MANAGEMENT COUNCIL APPOINTMENTS</b>	Action Item
6	<b>PPGA – ALCOHOL PERMITS-PRESIDENT APPROVED REPORT</b>	Information Item
7	<b>SDE – CURRICULAR MATERIALS COMMITTEE APPOINTMENTS</b>	Action Item

**BOARD ACTION**

I move to approve the Consent Agenda as presented.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

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**CONSENT AGENDA  
OCTOBER 22, 2015**

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**UNIVERSITY OF IDAHO**

**SUBJECT**

Request for authorization to sign Ednetics, Inc. contract for telephone systems upgrade.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.I.3 – Acquisition of Personal Property and Services.

**BACKGROUND/DISCUSSION**

Managing multiple disparate telephone systems at University of Idaho (UI) campuses in Boise, Coeur d'Alene, Idaho Falls, Moscow, and Post Falls is causing complexities and inefficiencies resulting in increased support and maintenance costs for these current systems. Additionally, the variety of vendors, differences in services, and lack of unified dialing schemes, is creating a discouraging user-experience and a perception of separation between locations.

Following a rigorous Request-For-Proposal (RFP) process, UI is presenting Ednetics, an Idaho-based company, as our Apparent-Successful-Vendor pending Board approval. UI is seeking Board approval to execute a contract with Ednetics for their Ednetics Voice service, a hosted telephone communication technologies solution based on a modern communications platform. The Ednetics Voice service will offer many new collaboration functions for a much better communications experience. In addition, the service will create a new University telecommunications support structure helping to eliminate administrative waste and supporting a new and simplified internal cost recovery model.

The proposed contract is not expected to increase the current annual costs of telephone services for UI over time. Contract costs are estimated at up to \$660,000 annually for an initial term of three (3) years with up to five (5) renewals of two (2) years each. This contract is requiring UI to guarantee a service minimum of 2,200 lines. Total annual lease costs will be based on monthly charges, variable usage, and other one-time charges. Included in this cost estimate is the cost of leasing hardware such as desk phone sets through a Master Lease Agreement.

UI's target of implementing up to 3,000 lines at the Boise, Coeur d'Alene, Moscow, Idaho Falls and Post Falls locations should be completed by the end of June, 2016. The current phone system at these locations will be phased out during this process. Implementing the remaining University locations, not part of this initial project (i.e., Centers, Research & Education Centers, Extension Offices, mobile offices, etc.), is dependent upon feasibility for the location, availability of necessary infrastructures, expiration of local contracts, and first opportunities for cost effective cut-overs at those locations.

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**IMPACT**

This is a three-year contract with renewal options for up to 10 additional years in two (2) year increments. The approximate total (dependent upon number of end-users) for three-years is \$1.99M. The ongoing annual costs of the contract (starting at \$660,000 annually) will be funded through UI's regular operations in the same fashion as the current phone system expenses are funded now. The implementation costs (estimated at \$150,000) will be funded through ongoing budget as well.

Estimated Budget (initial 3 years)

Total Contract Costs	\$1,980,000
Implementation Costs	<u>\$ 150,000</u>
Total	\$2,130,000

**ATTACHMENTS**

Attachment 1 – Proposed Contract	Page 3
Attachment 2 – University Request for Proposals (RFP)	Page 27
Attachment 3 – Ednetics, Inc. Response to RFP	Page 77

**STAFF COMMENTS AND RECOMMENDATIONS**

Staff recommends approval.

**BOARD ACTION**

I move to approve the request by the University of Idaho to enter into an agreement with Ednetics, Inc. in substantial conformance to the form submitted to the Board in Attachment 1, and to authorize the President of the University, or the President's designee, to execute the contract and any necessary supporting documents.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**UNIVERSITY OF IDAHO  
AGREEMENT NUMBER UI-762**

**INTRODUCTION**

The University of Idaho (the "University") hereby awards to Ednetics, Inc. (the "Contractor") Agreement number UI-762 to furnish Voice over Internet Protocol (VOIP) to the University, as specified in University of Idaho Request for Proposals Number 15-30M, in accordance with the terms and conditions of the Request for Proposals.

This Agreement is supplemented by a) University of Idaho Request for Proposals Number 15-30M; b) Ednetics, Inc.'s response dated March 3, 2015; and c) University of Idaho General Terms and Conditions, which have been agreed to by the parties and by this reference are made a part hereof as though fully set forth herein. To the extent such terms, conditions, or provisions may be in conflict or be inconsistent, their order of authority shall be as follows: 1) University of Idaho Agreement Number UI-762; 2) University of Idaho Request for Proposals Number 15-30M; 3) Ednetics, Inc.'s response dated March 3, 2015; and 4) University of Idaho General Terms and Conditions

**TERMS AND CONDITIONS**

These Terms and Conditions ("Agreement") are between Ednetics and the entity identified as the University of Idaho ("Customer"); each referred to as a "Party" and collectively referred to as the "Parties." This Agreement consists of the Sales Order(s) and any forms or authorizations attached hereto and/or incorporated herein by reference and these Terms and Conditions. The Parties agree to be bound by this Agreement and affirm that each have caused this Agreement to be executed by their respective duly authorized representatives on the dates written below their names.

**1. SERVICE(S).**

For purposes of this Agreement, "Service(s)" shall mean Ednetics Voice™ and the use of Ednetics equipment and services integral to performance and/or delivery of the Service(s) under this Agreement. Service(s) shall also refer to the Ednetics provided demarcation point between Customer's local area network ("LAN") and Ednetics wide area network ("WAN"). Specifically, the demarcation point is represented by a router and provides a physical demarcation ("Demarc") between Customer's LAN and Ednetics WAN. Ednetics is responsible for network on the WAN side of the Demarc and Customer is responsible for network on the LAN side of the Demarc. An understanding of operational support can be found in Exhibit D Service Level Agreement.

**2. EDNETICS VOICE™**

Ednetics Voice™ is an enhanced voice telecommunications service, which uses an Internet Protocol ("IP") infrastructure to deliver voice communications and IP

products. Ednetics Voice™ includes local dial-tone, local and long distance, international calling, access to directory assistance and operator services as well as Ednetics equipment and services integral to performance or delivery of Service under this Agreement. Ednetics Voice™ is a full-featured Voice over Internet Protocol (VoIP) Service and may be a stand-alone or hosted managed Service. Ednetics will provide Service(s) as referenced on the Sales Order(s) in accordance with the terms of this Agreement.

**2.1 HANDSETS.**

If ordered from Ednetics, handsets may be purchased using the Ednetics Master Lease Agreement for a zero percent (0%) 36-month lease. In the event Customer does not continue the Ednetics Voice™ contract and has outstanding handset leases, Customer will be required to pay the outstanding lease balances within 60 days. Customer shall own the handsets upon full completion (including final payment) of the Agreement Service Term. Lease Order(s) will be used for the purchase of handsets, which will be prorated over the Lease term unless other arrangements are made.

**2.2 BID PRICE.**

The bid price shall include everything necessary for the performance of this Agreement, including, but not limited to, furnishing all materials, equipment, management, superintendence, labor, and service, except as specifically otherwise provided in this Agreement. Prices quoted on the Bid Form shall include all freight and/or delivery charges. In the event of a discrepancy between the unit price and the total price, the unit price will govern and the total price will be adjusted accordingly.

**2.3 TOLL-FREE SERVICE.**

Customer is responsible for all charges for inbound toll free Service(s) provided by Ednetics. Ednetics assumes no liability where any claim arises out of Customer being provided with any toll-free number(s) other than the toll-free numbers(s) requested by Customer. Ednetics shall have no liability whatsoever for the use, misuse or abuse of Customer's toll-free Service by third parties, including without limitation, Customer's employees or any member(s) of the public who dial the Customer's toll-free number(s) by mistake. See Exhibit A Usage Pricing attached hereto and made a part of this Agreement by reference.

**2.4 LONG DISTANCE SERVICE(S).**

Customer is responsible for all local and long distance Service(s) used with and without their knowledge. Ednetics provides long distance Service(s) at no charge within the U.S. and Canada, including Alaska and Hawaii, but excludes International calls. Calls not covered will be billed to you at the rate shown in Exhibit A.

**3. INTERRUPTION OF SERVICE CREDIT(S).**

In the event there is any defect, error, omission, delay, mistake, interruption, suspension, or other failure in connection with furnishing Service(s) or maintenance of Service(s) and the same is reported to and confirmed by Ednetics (an "Interruption"), the liability, if any, of Ednetics shall in no event exceed an amount equivalent to the proportionate charge to Customer for the affected Service for the time period during which the interruption occurred (the

"Interruption Credit") as outlined below. For the purposes of this Section, "Interruption Credit" does not include data services or data integrations interfaced with Ednetics Voice™. The Interruption Credit applies only to Ednetics Voice™. Ednetics may simultaneously deliver service to more than one location for redundancy purposes. Ednetics does not consider that there is an interruption of service if phone services are delivered to at least one point of demarcation. Ednetics shall not be liable nor shall any Interruption Credit be given to Customer for any Interruption which is: (1) caused by the willfulness or negligence of Customer, a third-party (defined as: a party who is not a vendor of Ednetics and who is not the underlying circuit provider) or any other entity other than Ednetics; (2) due to failure of equipment and systems provided by Customer or any other entity; (3) due to a force majeure event as set forth in Section 30 below; or (4) during periods when Customer elects to use Service(s) on an impaired basis. Customer hereby acknowledges and agrees that its sole and exclusive remedy for an Interruption shall be an Interruption Credit as follows:

2 - 4 Hours	25% of the daily recurring cost
4 – 8 Hours	50% of the daily recurring cost
8 – 12 Hours	75% of the daily recurring cost
12 – 24 Hours	100% of the daily recurring cost
Over 24 Hours	100 % of the daily recurring cost for each 8 hour period over 24 hours.

4. LETTER OF AUTHORIZATION.

Customer will be required to execute a Letter of Authorization or Agency ("LOA") in order for Ednetics to act as an authorized agent for ordering, porting numbers, and coordination of circuits that may be needed. The LOA, when executed, shall be incorporated into this Agreement by reference.

5. 911 DISCLOSURE STATEMENT.

Customer is required to execute the 911 Disclosure Statement. The 911 Disclosure Statement is attached hereto as Exhibit B and made a part of this Agreement by reference.

6. SAFEGUARDING CUSTOMER PROPRIETARY NETWORK INFORMATION.

Ednetics considers our Customers' Proprietary Network Information (CPNI) as confidential. Ednetics will not share information specific to our Customers and/or their network with anyone other than the authorized representative(s) of Customer unless Customer sends written authorization to their Ednetics account manager. Such Letter of Authorization (LOA) must be signed by Customer's authorized representative stating the information Ednetics is to provide and to what party and/or company Ednetics is to disclose the information to upon request. This

procedure extends during the term of the contract and will continue after the contract expires.

**GENERAL TERMS AND CONDITIONS**

**7. DATA COMPROMISE NOTIFICATION.**

Immediately upon becoming aware of a Data Compromise, or of circumstances that could have resulted in unauthorized access to or disclosure of use of Customer or End User Data, Ednetics will notify Customer, fully investigate the incident, and cooperate fully with Customer's investigation of and response to the incident. Except as otherwise required by law, Ednetics will not provide notice of the incident directly to the persons whose data were involved, regulatory agencies, or other entities, without prior written permission from Customer.

**8. RESPONSE TO LEGAL ORDERS, DEMANDS, OR REQUEST FOR DATA.**

Except as otherwise expressly prohibited by law, Ednetics will:

- a. Immediately notify Customer of any subpoenas, warrants, or other legal orders, demands or requests received by Vendor seeking Customer and/or End User Data;
- b. Consult with Customer regarding its response; and
- c. Cooperate with Customer's reasonable requests in connection with efforts by Customer to intervene and quash or modify the legal order, demand or request

**9. OBLIGATIONS OF THE CUSTOMER.**

The customer agrees to provide all information, access, and support for timely installation and proper use of Service(s) and to comply with all of the terms and conditions of this Agreement. Customer also agrees that Customer's use of Service(s) will at all times be consistent with the terms outlined in Ednetics Acceptable Use Policy ("AUP"), will not be used in an unlawful manner and will be used in such a manner as to prevent damage to Ednetics network and equipment. Ednetics AUP is attached hereto as Exhibit C and is made a part of this agreement by reference.

**10. CUSTOMER REPRESENTATIONS.**

Customer warrants that they have the legal right and ability to enter into this Agreement and are authorized to act on behalf the school, library, or state/local government entity. Customer represents and warrants that Customer's name, contact information and registered location(s) for 911 are true and correct. Customer acknowledges and agrees that Ednetics relies on the information supplied by Customer and that providing false or incorrect information may result in delays in the provision and delivery of Service(s), the suspension or termination of Service(s) and the inability of a 911-dialed call to be correctly routed to emergency service personnel as further described in the 911 Disclosure Statement in Exhibit B, attached hereto and made a part of this Agreement by

reference. Customer agrees to promptly notify Ednetics whenever personal or billing information changes, including, but not limited to, Customer's name, address, e-mail address, telephone number, and credit card information if appropriate.

11. INITIAL DEPLOYMENT.

Customer will have an "Initial Deployment" period not to exceed six (6) months. The Initial Deployment is for the purpose of providing time for Customer to reach the minimum User threshold of 2200 Users ("Minimum User Floor"). The Initial Deployment will end six (6) months after execution of the contract or upon reaching 2200 Users, whichever occurs first ("End of Initial Deployment"). Customer will be invoiced at the contracted rate during the Initial Deployment and as described in Section 14.

12. TERM OF AGREEMENT.

The initial term ("Initial Service Term") of this Agreement shall start on the day the Initial Deployment starts and will end three (3) years from the End of Initial Deployment as described in Section 11. The Initial Service Term of this Agreement may be extended by a series of up to five (5) two (2) year renewals. Customer may also request to enter into a new agreement and term. Customer must provide written request in both instances at least thirty (30) days prior to the expiration date of such term or extension. During extension periods, all terms and conditions of this Agreement shall remain in effect.

13. FEES AND CHARGES.

Customer shall pay for all Service(s) Ednetics supplies to Customer. Sales Order(s) specify the fees Customer will pay for Service(s) during the Service Term. The fees on the invoice are categorized as (1) "Monthly Charges," (2) "One Time Charges", and (3) "Other Charges." Monthly Charges are recurring and will be billed monthly in advance. One Time Charges are non-recurring and will be billed as they occur. Other Charges are usage charges and will be billed based on Customer's actual usage which could include per minute fees for international long distance or other per call fees as reflected in Exhibit A. Ednetics will bill Customer and Customer will be responsible for other legally applicable charges including, but not limited to, federal and state universal service fund (USF), federal and state telecommunications relay service (TRS), state and county E911 surcharges, state and local sales taxes, and local utility taxes and any other applicable federal, state, county, or local taxes and fees. Customer's invoice will reflect all taxes and fees.

14. INVOICES.

Ednetics will invoice for Services one month in advance as documented by polling the system on the 20<sup>th</sup> of each month. Invoices will reflect the number of users, Analog Terminal Adapters, efax licenses, international long distance, credits for contract and/or migration discounts, miscellaneous items, and any Decreases of 15% or more from the then current maximum as described in

Section 24, if any. Customer invoice will also reflect the then current minimum threshold for User counts. Ednetics and Customer agree to work together to develop the Ednetics Portal to conform to Customer's detail expectations wherever possible. Both Ednetics and Customer agree this development is a work in progress and understand that resources will need to be dedicated from both sides to accomplish what is necessary to provide Customer with the detail desired.

Invoices for payment must be submitted by the Contractor to:

University of Idaho  
Attn: Accounts Payable  
875 Perimeter Drive MS 4244  
Moscow, ID 83844-4244

15. PAYMENT.

Ednetics will provide Customer with monthly invoices which will be due and payable thirty (30) days from the invoice date (the "Due Date"). For the purposes of billing and adjustments, Ednetics assumes there are thirty (30) days in a month and the Invoice Date is the 10<sup>th</sup> of each month. All Monthly Charges are billed one (1) month in advance from the 1<sup>st</sup> of the month up to the 1<sup>st</sup> of the next month. Other Charges, such as usage, international long distance and directory assistance charges are billed in arrears. All One Time Charges for installation and/or changes of service are invoiced on the first invoice following the date charges were incurred. Your initial invoice could contain One Time Charges and Other Charges as well as Monthly Charges for services in advance. A late payment fee may be applied on balances remaining unpaid thirty (30) days following the date of the invoice in the amount of one and one-half percent (1½%) per month of the amount of the unpaid balance from the date of invoice. Subject to any applicable state or federal regulations, in the event Customer has an outstanding balance of fees due and owing under this Agreement, Ednetics shall not be obligated to transfer transportable, toll-free, local or other numbers to another carrier. In addition to the remedies contained in this Agreement, Ednetics reserves its right in law and equity including, but not limited to, its rights under the Uniform Commercial Code.

16. TAXES.

Customer hereby acknowledges and agrees that all pricing for Service(s) and other charges due hereunder, including value added tax, sales taxes, duties, fees, levies or surcharges (including where applicable Universal Service Fund or similar surcharges) imposed by, or pursuant to the laws, statutes or regulation of any governmental agency or authority, are the sole responsibility of Customer and shall be paid promptly when due by Customer and Customer agrees to indemnify and hold Ednetics harmless from any liability therefor. Except as set forth herein, all amounts payable by Customer under this Agreement shall be made without any deduction or withholding and, except to the extent required by any law or regulation, free and clear of any deduction or withholding on account of any tax, duty or other charges of whatever nature imposed by any taxing or governmental

authority. If Customer is required by any law or regulation to make any such deduction or withholding, Customer shall, together with the relevant payment, pay such additional amount as will ensure that Ednetics actually received and is entitled to retain, free and clear of any such deduction or withholding, the full amount which it would have received if no such deduction or withholding had been required. Notwithstanding the foregoing, a monthly Universal Service Fund charge shall be added to each invoice for Service(s) based upon the applicable total billed revenues, the amount of which shall be based upon the Federal Communications Commission assessment.

**17. UNAUTHORIZED USE OF SERVICE(S).**

Customer accepts full responsibility for the charges and fees invoiced for Ednetics provision of all Service(s) to Customer including, but not limited to, outbound and toll free Service(s), regardless of whether Customer authorized the use of the Service(s). Customer shall indemnify and hold Ednetics harmless from any and all costs, expenses, damages, claims or actions arising from any fraudulent or unauthorized use of Service(s). Customer shall not be excused from paying Ednetics for Service(s) provided to Customer or any portion thereof on the basis that fraudulent use of Service(s) comprised a corresponding portion of the Service(s) for which charges and fees are invoiced. In the event Ednetics discovers or reasonably believes that Service(s) are being used fraudulently, nothing contained herein shall prohibit Ednetics from taking immediate and all reasonable actions necessary to prevent the fraudulent use of the Service(s).

**18. BACK-UP POWER.**

CUSTOMER ACKNOWLEDGES AND AGREES THAT IF ACCESS TO AND USE OF SERVICE(S) (INCLUDING, BUT NOT LIMITED TO, EMERGENCY 911 SERVICE) IS DESIRED OR REQUIRED DURING A POWER OUTAGE, CUSTOMER IS SOLELY RESPONSIBLE TO PROVIDE APPROPRIATE BACK-UP POWER TO ANY EQUIPMENT LOCATED ON CUSTOMER'S PREMISES TO THE EXTENT SUCH EQUIPMENT MAY BE USED TO ACCESS AND USE OR IS OTHERWISE RELATED TO THE USE OF SERVICE(S). EDNETICS SHALL NOT BE RESPONSIBLE OR LIABLE TO CUSTOMER OR ANY THIRD PARTY FOR THE UNAVAILABILITY OF SERVICE(S) DURING A POWER OUTAGE AS A RESULT OF CUSTOMER'S FAILURE TO PROVIDE NECESSARY BACK-UP OR SECONDARY POWER FACILITIES FOR USE OF SERVICE(S). PLEASE SEE EXHIBIT B FOR EDNETICS FULL 911 DISCLOSURE STATEMENT.

**19. TERMINATION BY EDNETICS.**

In the event Customer is in breach of any terms of this Agreement, Ednetics may provide written notice to Customer of such a breach, upon receipt of which Customer shall (i) have ten (10) days to cure such a breach if the breach is due to Customer's non-payment of all undisputed charges by the Due Date or (ii) have thirty (30) days to cure all other breaches of this Agreement. If such breach is not cured by Customer to Ednetics satisfaction, in its sole discretion, within the

applicable cure period set forth above, Ednetics may terminate this Agreement (in whole or in part including Sales Order(s)) and discontinue its provision of Service(s) under this Agreement effective immediately. Notwithstanding the foregoing, in the event Customer's use of Service(s) violates the Ednetics AUP, Ednetics may suspend the provision of Service(s) to the Customer or terminate this Agreement (in whole or in part including Sales Order(s)) effective immediately.

**20. TERMINATION BY EITHER PARTY.**

Either Party shall have the right to terminate Service(s) without liability, including early termination fees; (i) if Ednetics is prohibited from furnishing Service(s) under this Agreement, (ii) if any material rate or term contained herein is substantially changed by order of the highest court of any competent jurisdiction to which the matter is appealed, the Federal Communications Commission, or other local, state, or federal government authority or (iii) upon expiration of the Service Term.

**21. EARLY TERMINATION.**

If Service(s) are terminated by Customer or by Ednetics following an uncured default by Customer prior to the end of the Service Term, then commencing on the effective date of such termination, Customer will be subject to early termination fees equal to ninety percent (90%) of the remaining value of the Agreement ("Early Termination Fees"). Customer and Ednetics acknowledge and agree that (i) the Early Termination Fees are a fair and reasonable estimate of damages that would occur in the event that the Agreement is terminated prior to the end of the Service Term; (ii) actual damages incurred by Ednetics as a result of the early termination of the Agreement would be difficult to determine; and (iii) the provisions regarding the Early Termination Fees in this paragraph are reasonable and appropriate measures of the damages for such early termination and not a penalty. Customer agrees to pay all such Early Termination Fees within thirty (30) days of Customer's notice of termination of Service(s) immediately upon receipt of Ednetics last invoice to Customer ("Final Invoice"). All requests to terminate Service(s) must be received, in writing to Ednetics, thirty (30) days prior to the termination effective date. A minimum of thirty (30) days will always be billed to Customer from the date that the termination notice is submitted.

**22. BILL DISPUTES.**

Customer's billing disputes or requests for adjustment, together with all supporting documentation, must be made in good faith and must be received in writing by Ednetics within sixty (60) days from the date of the invoice or Customer's right to raise such billing disputes is waived. Customer shall otherwise timely pay any undisputed amount. If Ednetics determines that a disputed charge was billed in error, Ednetics will issue a credit to reverse the amount incorrectly billed. If Ednetics determines the disputed amount was billed correctly, Ednetics will inform Customer of such determination and provide Customer with proof of correct billing. If Customer does not accept such proof as

definitive, the dispute will be escalated for an officer review/resolution with Ednetics and Customer in accordance with this Agreement. In the event that the escalated dispute is resolved against Customer or in the event Customer accepts the foregoing proof as definitive (or if Customer fails to notify Ednetics within sixty (60) days that Customer does not accept proof as definitive), Customer shall pay the previously disputed amount within ten (10) days thereafter.

**23. RESOLUTION OF DISPUTES.**

Except as otherwise provided herein, any dispute, controversy or claim (individually and collectively referred to hereinafter as a "Dispute") arising under this Agreement shall be resolved in accordance with the procedures set forth herein. In the event of a Dispute, and upon the written request of either Party, each of the Parties shall appoint, within five (5) business days after a Party's receipt of such request, a designated representative who has authority to settle the Dispute and who is at the higher level of management than the person(s) with the direct responsibility for administration of the Agreement. The designated representatives shall meet as often as they reasonably deem necessary in order to discuss the Dispute and negotiate in good faith in an effort to resolve such Dispute. The specific format for such discussions will be left to the discretion of the designated representatives; however, all reasonable requests for relevant information made by one Party to the other shall be honored. If the Parties are unable to resolve issues related to the Dispute within thirty (30) days after a Party's request is made for appointment of designated representatives as set forth above, either Party may seek any relief to which it is entitled, whether at law or in equity. Contractor agrees that, notwithstanding the existence of any dispute between the parties, insofar as possible under the terms of the Agreement to be entered into, each party will continue to perform the obligations required of it during the continuation of any such dispute, unless enjoined or prohibited by any court.

**24. SERVICE INCREASES AND DECREASES.**

An "Increase" is defined as a change to Customer's existing Service(s) agreed to by Ednetics that will result in an increase in Customer's Monthly Charges and/or One Time Charges. Customer will be required to purchase the Increase for a term commitment that extends to the end of Customer's existing Term or the Customer may extend their term pursuant to Section 12.0. A "Decrease" is defined as a change to Customer's existing Service(s) or partial disconnect agreed to by Ednetics resulting in a decrease in Customer's Monthly Charges. If Customer's number of users Decrease below Minimum User Floor as defined in Section 11, or if Customer's number of users Decrease below the current maximum user count by fifteen percent (15%) ("Minimum User Threshold"), whichever is greater, Ednetics, in its sole discretion, may invoice Customer for Minimum User Threshold fees. Minimum User Threshold fees will be calculated as the number of users below Minimum User Floor or the number of users below Minimum User Threshold, whichever is greater, times ninety percent (90%) of the current per user rate. Ednetics, in its sole discretion, may invoice

Customer for Minimum User Threshold fees during the remainder of the term of this contract unless Customer's number of users returns to a level above the applicable Minimum User Floor or applicable Minimum User Threshold, at which time the Minimum User Threshold fees would no longer be invoiced to Customer.

**25. EDNETICS OWNED CUSTOMER PREMISES EQUIPMENT.**

Any Equipment installed by Ednetics to perform or deliver Service(s) under this Agreement which was not purchased by the Customer is the sole property of Ednetics and is referred to as "Ednetics CPE" or "CPE." Ednetics has the right to access, maintain, remove, replace or take any other action in connection with the CPE at any time for any reason. At all times, Customer shall: (1) refrain from physically tampering with or modifying CPE, or authorizing another to do so; and (2) provide Ednetics with reasonable, sufficient, and necessary access to Customer's facilities in order for Ednetics to fulfill its obligations under this Agreement. Customer shall provide Ednetics reasonable and necessary access to Ednetics CPE at all reasonable times in the event Ednetics needs to retrieve the CPE during or upon the expiration or termination of the applicable Service Term. Customer also agrees to cooperate with Ednetics in all communications with the landlord at the Customer's premises if requested by Ednetics even after the expiration or termination of the applicable Service Term so that Ednetics may retrieve physical possession of the CPE. Customer shall be responsible for any and all damages to the CPE caused by Customer or its end-users. Ednetics will not be responsible for any interference or interruption in Service(s) that are related to or caused by CPE. Customer is responsible for the initial and ongoing configuration of any equipment provided by Customer. If any equipment provided by Customer is not compatible or may not be used with the Service(s) and Customer terminates this Agreement or Service(s) as a result, Customer will be responsible for all Non-Recurring Charges for Service(s) that are noted on the Sales Order(s) as well as any third-party costs Ednetics may have incurred.

**26. LIMITATION OF LIABILITY.**

Ednetics shall not be liable or responsible for any of the following: (1) the content of the information passing over Ednetics network; (2) the Internet or any information contained thereon; (3) unauthorized access to Customer transmission facilities or to Customer owned equipment; (4) unauthorized access or damage to, alteration, theft, destruction or loss of customer records or data; (5) claims for damages caused by Customer through fault, negligence or failure to perform Customer's responsibilities; (6) claims against Customer by any other party; (7) any act or omission of any other party furnishing services to Customer or the installation and/or removal of any and all equipment supplies by any other services provider; or (8) incorrect publication of listings or advertisements of phone numbers. Notwithstanding the foregoing, the liability of Ednetics, if any, for damages arising out of mistakes, omissions, interruptions, delays, errors, or defects in the Service(s) or equipment provided by Ednetics, if any, or for breach or warranties set forth in this Agreement, shall in no event exceed the Monthly

Charges for Service(s) that are the subject of the claim. IF ANY LIABILITY IS IMPOSED ON EDNETICS, SUCH LIABILITY SHALL BE LIMITED AS PROVIDED IN THIS AGREEMENT, WHICH SHALL BE EDNETICS SOLE AND EXCLUSIVE LIABILITY REGARDLESS OF WHETHER LOSS OR DAMAGE IS CAUSED BY PERFORMANCE, NON-PERFORMANCE, OR NEGLIGENCE OF EDNETICS UNDER THIS AGREEMENT. EDNETICS SHALL HAVE NO LIABILITY TO CUSTOMER OR ANY THIRD-PARTY FOR OR WITH RESPECT TO ANY SPECIAL, INCIDENTAL, INDIRECT, CONSEQUENTIAL, OR PUNITIVE DAMAGES OF ANY NATURE OR FOR THE LOSS OF REVENUE, LOST PROFITS, LOSS OF BUSINESS, LOSS OF PROSPECTIVE OR POTENTIAL BUSINESS OR ECONOMIC LOSS OF ANY KIND FOR ANY REASON WHATSOEVER, REGARDLESS OF WHETHER EDNETICS IS INFORMED OF THEIR POSSIBILITY.

27. LIABILITY OF CUSTOMER.

In the event any claim, demand, lawsuit or liability is made or asserted against Ednetics or any of the officers of Ednetics by any third-party and the same arises out of, or is directly or indirectly related to, or is caused by any act or omission of Customer, then, and in such event, Customer shall indemnify, defend and hold harmless Ednetics and its officers, agents and representatives of and from any and all such claims, demands, causes of actions and liability, including the payment of reasonable attorneys' fees to defend such action. Additionally, Customer shall reimburse Ednetics for damage to Ednetics Communications facilities including those due to any malfunction of any facilities or equipment provided by an entity other than Ednetics.

28. WARRANTIES.

EDNETICS DOES NOT WARRANT UNINTERRUPTED OPERATION OF THE SERVICE(S) AND SPECIFICALLY DISCLAIMS ANY OTHER WARRANTIES NOT MADE IN THIS AGREEMENT, EITHER EXPRESSED OR IMPLIED, INCLUDING THE WARRANTIES OF TITLE, MERCHANTABILITY AND FITNESS FOR PARTICULAR PURPOSE. EDNETICS DOES NOT WARRANT AND DOES NOT ASSUME ANY LIABILITY FOR ANY CONSEQUENCES SUFFERED BY ANY PERSON AS A RESULT OF OBTAINING INTERNET ACCESS INCLUDING, WITHOUT LIMITATION, DAMAGES ARISING FROM INTERNET CONTENT OR FROM COMPUTER VIRUSES.

29. TRANSFER AND ASSIGNMENT.

Customer may not sell, assign or transfer any of Customers rights or obligations under this Agreement without Ednetics prior written consent. Ednetics may assign this Agreement upon notice to Customer.

30. FORCE MAJEURE.

Any delay, interruption or nonperformance of any provision of this Agreement on the part of Ednetics caused by conditions beyond Ednetics reasonable control shall not constitute a breach of the Agreement and the time for performance of such provision shall be deemed to extend for a period equal to the duration of the conditions preventing performance. Such examples include, but are not limited to, acts of God, acts of civil or military authority, terrorist acts, riots, insurrections, epidemics, power blackouts, fire, explosion, vandalism, cable cut, adverse weather conditions, earthquakes, nuclear accidents, floods, governmental action, moratoriums or injunctions related to the construction and shortage of labor and materials (collectively a Force Majeure Event).

31. NON-DISCLOURE AND PUBLICITY.

Pursuant to Idaho Code, Customer shall not disclose to any third party the terms and conditions of this Agreement without the prior written consent of Ednetics.

32. NOTICES.

Any notice under this Agreement shall be in writing and be delivered either in-person, delivery service, certified mail with return receipt requested, or by facsimile. All notices shall be addressed to the parties at the following addresses or at such other addresses as the parties may from time to time direct in writing:

University: University of Idaho  
Contracts and Purchasing Services  
875 Perimeter Drive MS 2006  
Moscow, Idaho 83844-2006  
Attn.: Julia R. McIlroy, Director  
Phone: (208) 885-6123  
Fax: (208) 885-6060  
Email: juliam@uidaho.edu

Contractor: Ednetics, Inc.  
971 South Clearwater Loop, Suite 1000  
Post Falls, Idaho 83854  
Attn.: Susan Lamb, Contract Administrator  
Phone: (208) 619-2679  
Fax: (208) 619-4161  
Email: susan.lamb@ednetics.com

With a copy to: Ednetics, Inc.  
971 South Clearwater Loop, Suite 1000  
Post Falls, Idaho 83854  
Attn.: Jenny George,  
Phone: (208) 777-4709  
Fax: (208) 777-4708  
Email: jenny@ednetics.com

University of Idaho  
Information Technology Services Contract Manager  
875 Perimeter Drive MS 2006  
Moscow, Idaho 83844-2006  
Attn.: Mary George, ITS Director  
Phone: (208) 885-5222  
Fax: (208) 885-7539  
Email: maryg@uidaho.edu

University of Idaho  
Information Technology Services Service Owner  
875 Perimeter Drive MS 2006  
Moscow, Idaho 83844-2006  
Attn.: Brian D. Cox, ITS Director  
Phone: (208) 885-7301  
Fax: (208) 885-7539  
Email: bdc Cox@uidaho.edu

Any notice shall be deemed to have been given on the earlier of: (a) actual delivery or refusal to accept delivery, (b) the date of mailing by certified mail, or (c) the day facsimile delivery is verified. Actual notice, however and from whoever received, shall always be effective.

33. SEVERABILITY.

The terms and conditions of this Agreement are declared severable if any term or condition of this Agreement or the application thereof to any person(s) or circumstance(s) is held invalid. Such invalidity shall not affect other terms, conditions, or applications which can be given effect without the invalid term, condition, or application.

34. ENTIRE AGREEMENT.

This Agreement, including all exhibits and attachments which are hereby included and incorporated, constitutes the entire Agreement between the parties. No change thereto shall be valid unless communicated in writing in the stipulated manner and signed by both the University and the Contractor.

The effective date of this contract is \_\_\_\_ October, 2015.

For the Regents of the  
UNIVERSITY OF IDAHO

EDNETICS, INC.

\_\_\_\_\_  
Sign  
  
\_\_\_\_\_  
Julia McIlroy  
Print

\_\_\_\_\_  
Sign  
  
\_\_\_\_\_  
Shawn Swanby  
Print

Director Contracts & Purchasing Services  
Title

\_\_\_\_\_  
Date

President  
Title

\_\_\_\_\_  
Date

Exhibit A | Usage Pricing

Long distance calls to points outside of the United States and Canada are considered international.	\$0.15 per minute
Directory Assistance	\$0.75 per call
Operator Assistance	Operator Assistance calls are charged to your credit card and current rates may be obtained from the Operator before placing your call.
Toll Free Service within the United States and Canada	\$1.00/number/per month; and \$0.025/per minute

**Exhibit B | 911 Disclosure Statement**

1. Enhanced 911 Service (“E911”): When a caller from a registered location dials the digits 9-1-1 from any telephone that is associated with a phone number and a registered address, the phone number and address are automatically presented to the local emergency center serving the location.
2. Basic 911 Service: When a caller from a registered location dials the digits 9-1-1 using any telephone, the call is sent to the local emergency center serving that location, the telephone number and address associated with that telephone for call back and location purposes is not transmitted. The Basic 911 Service emergency center is not equipped to receive, capture or retain the telephone number associated with the caller's telephone service or the registered address. Accordingly, callers must be prepared to provide both call-back and address information. If the call is dropped or disconnected, or if the caller is unable to speak, the emergency operator answering the call will not be able to call the caller back or dispatch help to the caller’s address if call-back and address information has not been provided by the caller.
3. 911 service will not work if you experience a power outage, service outage, or a network disruption: To mitigate this possibility, Ednetics provides automatic fail over to analog lines; however, the battery back-up is Customer's responsibility. In the event the battery back-up runs down or fails, Customer should maintain an alternate means of calling emergency services at all locations, such as 911 capable wireless handsets or wireline analog lines.
4. You may not be able to reach the correct emergency services if your telephone number does not match your registered location information: To accurately route 911 calls to the appropriate emergency call center, Customer must provide at least one Direct Inward Dial telephone number for each separate address location using VoIP telephone service as the call-back telephone number. To mitigate the possibility of not reaching the correct emergency services, Ednetics requires location information on all telephone number additions and/or changes that Ednetics or Customer perform.
5. You may not be able to reach the correct emergency services if you move your phone to a location different from the address initially registered or change your telephone number: Accurate location information must be registered each time Customer changes the phone's location or telephone number. If you do not, you may not be able to reach the correct emergency services and they may not be able to transfer your call to the correct emergency services. To mitigate this possibility, Ednetics will require this information on all moves, adds and/or changes Ednetics does for Customer and also of those that Customer performs.
6. Customer responsibility: It is Customer's responsibility to keep your registered locations and telephone numbers updated with Ednetics at all times, to make sure others know of the 911 limitations above and what to do in an emergency. Customer is also responsible to place 911 stickers or easily seen signs on or near your phones warning of the situations in 2 (if applicable), 3, 4, and 5 above.
7. Limitation of Liability and Disclaimers. CUSTOMER SPECIFICALLY AGREES THAT IN NO EVENT WILL EDNETICS OR ITS DIRECTORS, OFFICERS, EMPLOYEES,

CONTRACTORS, OR AGENTS BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES ARISING, DIRECTLY OR INDIRECTLY, FROM OR IN CONNECTION WITH ANY USE OF, OR INABILITY TO USE, THE SERVICES OR WITH ANY USE OF, OR INABILITY TO USE, EMERGENCY 911 SERVICES IN CONNECTION THEREWITH. CUSTOMER ALSO AGREES TO RELEASE AND DISCHARGE EDNETICS, TOGETHER WITH ITS DIRECTORS, OFFICERS, EMPLOYEES, CONTRACTORS, AND AGENTS, FROM ANY AND AGAINST ALL ACTIONS, LAWSUITS, CLAIMS, DAMAGES, JUDGMENTS, LIABILITIES AND EXPENSES, INCLUDING WITHOUT LIMITATION REASONABLE ATTORNEYS' FEES, THAT CUSTOMER MAY OTHERWISE HAVE IN CONNECTION WITH USE, WHETHER BY CUSTOMER OR BY ANY OTHER PERSON OF THE SERVICES THAT ARE PROVIDED TO YOU UNDER THIS AGREEMENT (COLLECTIVELY, "CLAIMS"). TO THE FULLEST EXTEND PERMITTED BY LAW, YOU WAIVE YOUR RIGHT (AND COVENANT NOT) TO BRING SUIT FOR SAID CLAIMS AGAINST EDNETICS OR ANY OF THE OTHER PERSONS MENTIONED ABOVE.

**Acknowledged and Agreed**

Signature

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

Title: Director Contracts & Purchasing Services

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

**Exhibit C | Acceptable Use Policy**

1. Unlimited Voice Services. Customer agrees to use the unlimited service plan for traditional voice or fax calling of duration comparable to that of an average business customer. Customer agrees they will not employ methods, devices or procedures to take advantage of the unlimited service plan by using the voice or fax services excessively or for means not intended by Ednetics. Excessive use is defined by Ednetics as use that substantially exceeds the average call duration used by all other Ednetics unlimited voice service plans caused by excessive local number conference calling, monitoring services, data transmissions of broadcasts or transmission of recorded material. Ednetics has the right to terminate Customers' Service if, in its sole discretion, Ednetics determines that that Customer's use of the unlimited plan violates this prohibition or is otherwise "unreasonable" or results in abuse of the unlimited minute service plan.
  - a. Examples of "unreasonable" use are:
    - i. Re-sell, re-brand, re-supply, re-market or commercially exploit the unlimited service plan, without written consent, in order to aggregate traffic from more than one customer over an "unlimited line or trunk;
    - ii. Set-up routing functionality such that only outbound long-distance traffic is sent over the unlimited service; or
    - iii. Engage in any other conduct which is fraudulent or results in significant network congestion or degradation.
  - b. Examples of "abusive" use are:
    - i. Autodialing;
    - ii. Continuous, repetitive or extensive call forwarding;
    - iii. Continuous call session connectivity;
    - iv. Fax broadcasting;
    - v. Fax blasting;
    - vi. Telemarketing; or
    - vii. Any other activity that would be inconsistent with reasonable business use that may cause network congestion or jeopardizes the integrity of Ednetics.
2. Lawful Purposes Only. Customer may use Ednetics Services for lawful purposes only. Customer may not use Ednetics Service or equipment in any way that is illegal, improper, or inappropriate. Illegal, improper or inappropriate uses of Ednetics Services and/or equipment include the following:
  - a. Interfering with the ability to provide service to the Customer or other customers;
  - b. Use of the Service to threaten, abuse, harass, defame, deceive, defraud, interfere or invade another's privacy or engage in any similar behavior;
  - c. Use of the Service to impersonate another person, send bulk unsolicited messages, use data mining techniques, or other automated devices or programs to catalog, download, store, or otherwise reproduce or distribute information from Ednetics or use any automated means to manipulate the service; or

- d. Use the Service for transmitting or receiving any communication or material of any kind which would constitute a criminal offense, give rise to a civil liability, or otherwise violate and applicable local, state, national or international law or encourage conduct that would constitute a criminal offense, give rise to a civil liability, or otherwise violate any applicable local, state, national or international law.
3. Right of Termination. Ednetics reserves the right to terminate the Service immediately and without advance notice if Ednetics, in its sole discretion, believes that Customer has violated any of the above restrictions.
4. Theft of Service. Customer may not use or obtain the Service in any manner that avoids Ednetics policies and procedures, including an illegal or improper manner. Customer will notify Ednetics immediately in writing if Customer believes the Service is stolen, used fraudulently, or otherwise being used in an unauthorized manner. If Customer notifies Ednetics of one of these events, Customer must provide an account number and a detailed description of the circumstances of the theft, fraudulent use, or unauthorized use of the Service.
5. Revisions to this Acceptable Use Policy. Ednetics reserves the right to revise, amend, or modify this AUP at any time in any manner. Any revision, amendment, or modification (“Update”) will be effective fifteen (15) calendar days after Ednetics sends notice to Customer, identified in Section 32. Notices, ITS Contract Manager, and ITS Service Owner advising of such Update to the AUP. Your continued use of our Services after the Update shall constitute your acceptance of the Update. If you have questions about the AUP, or about your rights and responsibilities, please contact your Account Manager.

## Exhibit D| Service Level Agreement



### Ednetics Voice

Ednetics Voice is a fully managed private-cloud based service, built on the award winning Cisco Unified Communications platform. It provides full enterprise features with lower initial capital expenditure and a lower total cost of ownership when compared to a traditional on-premise system. Ednetics Voice includes local dial-tone, local and long distance, international calling, access to directory assistance and operator services as well as Ednetics equipment and services integral to performance or delivery of Service. Designed specifically for the education community, Ednetics Voice is delivered over a private high performance network offering unparalleled performance and reliability.

### Private Network

Ednetics delivers Voice service through dedicated and private connections to customer locations. We interface with our customers at multiple points of entry where possible, to provide enhanced resiliency and reliability of the service. Ednetics maintains and supports this network completely regardless of the upstream provider.

### Conferencing

Ednetics Voice includes the bundled audio conferencing built into UCM. UCM version 11 which will include the following conferencing features:

- Allows both internal and external callers to join a conference by dialing a Conference Now IVR Directory Number
- An IVR application guides the caller to join the conference by playing an IVR announcement
- A conference is established using a Meeting Number, which is same as the Self-Service User ID. The meeting number can be configured by the administrator in the End User's page
- The host informs the Meeting Number, Time slot, and Attendees Access Code to all the participants
- Calls will queue and receive MOH until the host joins the bridge
- External/Internal Caller Access
- One centralized conference assistant number per cluster
- Flexibility for End User to configure Attendee Access Code
- IVR guided process
- Participants are placed on Music on Hold (MOH) until the host joins

Ednetics understands that the advanced conferencing functionality available in version 11 is highly desired by UI and will aggressively pursue an early-as-possible implementation of this software. The University needs to understand that Version 11 is a major update that must be thoroughly tested before it can be implemented.

### Part of Your Technology Team

The Ednetics Voice Support Plan provides support coverage for all designated technology under one convenient plan. Ednetics Voice customers have access to the expertise of the entire Ednetics team of specialized engineers. The plan includes unlimited expert technical support via phone, e-mail and remote assistance. You also get guaranteed response times to quickly and efficiently resolve your technology support issues. We are proud to be part of your team.

### Support Desk

Ednetics has a fully staffed, dedicated, support desk for quickly handling support requests. Support desk personnel enter individual support issues into the system so that each item can be properly tracked to its conclusion.

### Account Manager

James Hersey  
E-mail: james.hersey@ednetics.com  
Toll Free: 888.809.4609

**Support Information**

In order to ensure your support request is properly received and response times are met, you must submit your support request through:

E-mail: support@ednetics.com  
Toll Free Phone: 877.809.4610  
Ednetics Portal: portal.ednetics.com

Ednetics offices are open Monday through Friday 6 a.m. to 7 p.m. Pacific Standard Time excluding Ednetics observed holidays. For emergencies, an on-call technician can be reached 24x7. Normal cases submitted outside of Ednetics business hours will be queued promptly the next business day.

**Response Times**

Ednetics will respond to properly submitted requests for support within the time specified below.

**EMAIL SUPPORT**

4 business hour response time

**PHONE SUPPORT**

4 business hour response time

**REMOTE SUPPORT**

4 business hour response time

**ONSITE SUPPORT**

Scheduled. Emergency onsite support is available next business day or as replacement parts are available.

**SYSTEM OUTAGE**

1 hour or less response time

**ON-SITE SUPPORT**

Billed hourly at \$125/hour

**MAC SLA**

Ednetics will resolve all normal MAC requests within 2 business days.

**Remote Support**

Ednetics will provide remote support via VPN, WebEx, phone, and e-mail, for items covered under this plan. This support includes troubleshooting for existing equipment and configurations. If during the course of remote support, Ednetics finds it necessary, on-site support services will be scheduled.

**Onsite Support Services**

On-site support services are available at a reduced, flat-rate. Travel is billed at half the on-site rate. If a support issue cannot be resolved via remote support, on-site support services will be scheduled next business day or as replacement hardware is available.

**Moves, Adds and Changes**

The Ednetics support staff will assist our customers with processing MAC requests (see definitions) remotely using system

management tools.

**Hardware Support**

Phone handsets come with a one-year manufacturer warranty, which can be renewed by the customer. Ednetics support staff will assist in identifying cases where hardware repair or replacement is necessary. Ednetics can also assist in the resolution of hardware cases up to repair or replacement. With the exception of Ednetics owned equipment, hardware repair or replacement requires 3<sup>rd</sup> party warranty (such as Cisco SMARTnet).

Ednetics stocks handsets for rapid replacement in Post Falls, Moscow, and Boise. These handsets may be purchased or added to the customer's lease agreement.

**Technology and Personnel Requirements**

This plan requires the use VPN access. The customer firewall must be capable of IPSEC or SSL VPN connectivity. This is necessary to improve remote response capability. Alternatively, we can provide an Ednetics-owned firewall to be used for VPN termination.

This plan also requires the designation of a customer personnel resource, or resources with administrator level credentials for all items under support to participate in remote troubleshooting when necessary.

**Support Management Meetings**

For the first six months of the contract, monthly support meetings will be held. After the first six months support meetings can be requested quarterly. The support meetings will be used to discuss the high-level status of the support relationship between the Customer and Ednetics, including processes and procedures. These meetings will be held as conference calls or WebEx.

**System Administrator Training**

Administrative training will be provided at the time of project implementation. Sessions are recorded and made available for customer use. Additional remote training sessions may be requested up to twice per contracted year.

**Exclusions**

This plan is not intended to provide tier I support (see definitions) or as a replacement for existing customer resources. It is intended supplement existing customer resources by providing technical support at tiers II and III (see definitions). This plan is not intended to provide desktop or handset support to end users, their workstations or software applications. This plan does not include the setup of new equipment or software, new configurations or configuration changes (other than MAC). On-site MAC requests are not covered and would be handled separately on a time and materials or project basis. Cisco Unified Contact Center support excludes the creation of new applications and the creation of new or modification of existing scripts. This contract does not provide hardware warranty or replacement (except for Ednetics owned equipment). However, hardware repair or replacement assistance is available and can be obtained through the Ednetics support desk.

**Definitions**

***Ednetics Observed Holidays***

New Year Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, December 25, December 24 or 26.

***Move, Adds and Changes (MACs)***

These are system administration tasks, which become necessary when users or certain devices are added to, removed from or change their location on the network or phone system. Ednetics Voice Support Plan currently covers the following types of MACs:

*CISCO VOICE*

Phone line changes, User display changes, Call behavior e.g.; hunt groups, Addition of a new phone instrument, Eg11 Update, User Management in Unity Connection, Variations to Message Handler, VM PIN reset, add/remove line, CCX User/Application Management (agent/supervisor/group assignments, associate application with existing scripts or prompts).

***Tier I Support***

Initial support level, end-user support, and basic customer issues. Tier I Support is not included in the plan.

***Tier II Support***

Administrator support level, more in-depth customer issues, investigating and trouble-shooting to solve issues.

***Tier III Support***

Highest support level, expert level trouble-shooting and analysis

***Ednetics Portal***

Ednetics Portal is our tool for simplifying MACs, providing access to billing records and call statistics/details, view/update current and resolved support cases.

Ednetics welcomes user feedback to improve or enhance our Portal. These requests can be made through our normal support channels.

If a custom need arises that is unique to a specific customer, an enhancement project can be coordinated at a negotiated rate.

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# University of Idaho

Contracts & Purchasing Services

Mailing Address:  
875 Perimeter Drive MS2006  
Moscow, Idaho 83844-2006

**Request for Proposals No. 15-30M**

**for**

**Unified Communications as a Service (UCaaS)**

Julia R. McIlroy, Director  
Contracts & Purchasing Services

Phone: 208.885.6123  
[juliam@uidaho.edu](mailto:juliam@uidaho.edu)  
[www.purchasing.uidaho.edu](http://www.purchasing.uidaho.edu)

**Date Issued: February 1, 2015**

**Proposals Due: March 3, 2015**

UNIVERSITY OF IDAHO REQUEST FOR PROPOSALS NO. 15-30M

PROPOSAL RESPONSE CERTIFICATION

DATE

The undersigned, as Proposer, declares that they have read the Request for Proposals, and that the following proposal is submitted on the basis that the undersigned, the company, and its employees or agents, shall meet, or agree to, all specifications contained therein. It is further acknowledged that addenda numbers \_\_\_\_\_ to \_\_\_\_\_ have been received and were examined as part of the RFP document.

Name

Signature

Title

Company

Street Address

City, State, Zip

Telephone Number and Fax Number

Cell Phone Number

E-mail Address

State of Incorporation

Tax ID Number

Business Classification Type (Please check mark if applicable):

- Minority Business Enterprise (MBE) \_\_\_\_\_
- Women Owned Business Enterprise (WBE) \_\_\_\_\_
- Small Business Enterprise (SBE) \_\_\_\_\_
- Veteran Business Enterprise (VBE) \_\_\_\_\_
- Disadvantaged Business Enterprise (DBE) \_\_\_\_\_

Business Classification Type is used for tracking purposes, not as criteria for award.

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## **SECTION 1 -INSTRUCTIONS TO PROPOSERS**

### **1.1 SCOPE OF WORK**

The University of Idaho (herein referred to as the University) is soliciting proposals for a Hosted (Cloud) Unified Communications System to provide telephony services for its main campus located in Moscow, Idaho and branch campuses across the state of Idaho. This service may be referred to as Unified Communications as a Service (UCaaS) or Unified Communications (UC).

Proposals must be SEALED and CLEARLY IDENTIFIED with the Request for Proposals' number, due date and time, Proposer's name and address, and submitted no later than 4:00 p.m. (PST), on **March 3, 2015** to:

**University of Idaho - Contracts & Purchasing Services**

**875 Perimeter Drive MS 2006**

**Moscow, ID 83844-2006**

Proposals may be submitted in-person. A facsimile response or an electronic response to this Request for Proposals does not meet the requirement of a sealed proposal and will not be accepted.

The proposal must be signed by such individual or individuals who have full authority from the Proposer to enter into a binding Agreement on behalf of the Proposer so that an Agreement may be established as a result of acceptance of the proposal submitted. By reference, the terms and conditions set forth in the Request for Proposals shall serve as the Agreement terms and conditions. In addition, the laws of the State of Idaho shall apply. No other terms and conditions will apply unless submitted as a part of the proposal response and accepted by the University.

Proposals received after the exact time specified for receipt will not be considered.

### **1.2 REQUEST FOR PROPOSAL SCHEDULE**

February 1, 2015	Request for Proposals issued
February 13, 2015	Pre-Proposal Telephone Conference
February 18, 2015	Inquiries Due
March 3, 2015	Proposals Due by 4:00 p.m. (Pacific Standard Time)
March 13, 2015	Finalists selected
March 16, 2015	Finalists will build a functional prototype service (See 3.3)
March 27, 2015	Finalists prototype build work must be completed
March 30 - April 6	Finalists on-campus presentations to RFP evaluation committee

All inquiries concerning this RFP must be submitted in writing and received by Purchasing Services no later than February 18, 2015 to:

Julia R. McIlroy, Director, Contracts & Purchasing Services

E-mail: [juliam@uidaho.edu](mailto:juliam@uidaho.edu)

Proposers should consider Purchasing Services as the first and prime point of contact on all matters related to the procedures associated with this RFP. If additional information is needed from any source, Purchasing Services will work with the Proposer and with the various offices of the University to gather that information.

### **1.3 INTERPRETATION, CORRECTIONS, OR CHANGES IN RFP**

Any interpretation, correction, or change in the RFP will be made by addendum by the University. Interpretations, corrections, or changes to the RFP made in any other manner will not be binding, and no Proposer may rely upon any such interpretation, correction, or change.

## **1.4 MODIFICATION OR WITHDRAWAL OF PROPOSALS**

A Proposer may modify or withdraw a proposal at any time prior to the specified time and date set for the proposal closing. Such a request for modification or withdrawal must be in writing, and executed by a person with authority as set forth under paragraph 1-2 above, or by facsimile notice subsequently confirmed in writing.

## **1.5 ERASURES AND INTERLINEATIONS**

Erasures, interlineations, or other changes in the proposal must be initialed by the person(s) signing the proposal.

## **1.6 ACKNOWLEDGMENT OF ADDENDUMS TO RFP**

Receipt of an addendum to this RFP must be acknowledged by a Proposer on the Proposal Response Certification (Attachment A).

## **1.7 PROPOSAL COPIES**

**Eight (8) complete copies** of the proposal shall be submitted to the University.

## **1.8 OFFER ACCEPTANCE PERIOD**

A proposal shall constitute an offer to contract on the terms and conditions contained in this RFP and the proposal. Said proposal shall constitute an irrevocable offer for ninety (90) calendar days from the proposal opening date, even if the University makes one or more counter offers.

## **1.9 REJECTION OF PROPOSALS**

The University in its sole discretion, expressly reserves the right to reject any or all proposals or portions thereof, to reissue a Request for Proposal, and to waive informalities, minor irregularities, discrepancies, and any other matter or shortcoming.

## **1.10 PROPOSAL PRICE**

The prices submitted in the proposal shall include everything necessary for the prosecution and completion of the Agreement including, but not limited to, furnishing all materials and all management, supervision, labor and service, except as may be provided otherwise in the Agreement Documents. In the event of discrepancy between the unit prices and their extensions, the total price will be adjusted accordingly. In the event of discrepancy between the sums of the extended total prices, the Total Proposal Price will be adjusted accordingly. The proposal price shall not include any allowance for Idaho State sales/use tax.

The University will evaluate the total price for the basic requirements with any options(s) exercised at the time of award. Evaluation of options will not obligate the University to exercise the option(s).

The University may reject an offer if it is materially unbalanced as to process for the basic requirements and the option quantities. An offer is unbalanced when it is based on prices significantly less than cost for some work and prices that are significantly overstated for other work.

## **1.11 TERM OF AGREEMENT**

The proposal shall be based on a term of three (3) years, commencing upon the date of execution by the university. The agreement may, if mutually agreed upon in writing, be extended by three (3), two-year increments for a total of six (6) additional years, provided written notice of each extension is given to the Proposer at least thirty (30) days prior to the expiration date of such term or extension. In the event funding approval is not obtained by the University, this Agreement shall become null and void effective the date of renewal. During extension periods, all terms and conditions of this Agreement shall remain in effect.

### **1.12 AWARD OF AGREEMENT**

The University shall make the award to the responsible Proposer whose proposal will be most advantageous to the University with respect to price, conformance to the specifications, quality, and other factors as evaluated by the University. The University is not required or constrained to award the Agreement to the Proposer proposing the lowest price.

The University may award an Agreement on the basis of initial offers received, without discussion; therefore, each initial offer should contain the Proposer's best terms from a cost and technical standpoint.

### **1.13 PUBLIC AGENCY**

The Proposer has agreed to extend contract usage to other public agencies, such as any city or political subdivision of this state, including, but not limited to counties; school districts; highway districts; port authorities; instrumentalities of counties, cities or any political subdivision created under the laws of the State of Idaho; any agency of the state government; or any city or political subdivision of another state.

### **1.14 PROPOSAL CONFIDENTIALITY**

Each Proposer agrees that the contents of each proposal submitted in response to this RFP is confidential, proprietary, and constitutes trade secret information, as defined in Idaho Code 9-340D(1), as to all technical and financial data LABELED CONFIDENTIAL BY THE PROPOSER, and waives any right of access to such information, except as provided for by law. Except as determined by the University's Office of Purchasing Services, in its sole discretion, no information will be given regarding any proposals or evaluation progress until after an award is made, except as provided by law.

### **1.15 F.A.R. REQUIREMENT**

All purchase orders and contracts issued by the University of Idaho are subject to F.A.R. 52.209-6. Supplier warrants that supplier or its principals are presently debarred, suspended or proposed for debarment by the federal government.

### **1.16 RECORD OF PURCHASES**

Proposer will provide Purchasing Services a detailed usage report of items/services ordered, quantities, and pricing under this Agreement upon request.

### **1.17 APPEAL OF AWARD**

A Proposer aggrieved by the award of an Agreement may file an appeal by writing to the Director of Purchasing Services. The appeal must be received by the Director of Purchasing Services within five working days after the award is made, must describe the basis for the appeal, and must include all arguments and evidence the Proposer wishes the Director of Contracts & Purchasing Services to consider. Keeping track of the date an award is made is the responsibility of the Proposer(s).

### **1.18 INSTRUCTIONS FOR PREPARING PROPOSALS**

To aid in the evaluation process, it is required that all responses comply with the items and sequence as presented in **the RFP. Using this RFP as a source document, fill in your response immediately following the question.** If there are any requirements that require clarification, additional relevant information or the Proposer needs to take exception to, please indicate after the appropriate question. Use an alternative color font to allow your answers to be easily recognizable. The minimum requirements and packaging for the preparation and presentation of a response are as follows:

- Answer all questions immediately following the question text.
- Use a font color other than black so answers are easily identified.
- Use N/A to indicate if something is not applicable.

- Proposal must be printed on 8½” by 11” paper.

Failure to comply may result in rejection of the response. The proposal should be specific and complete in every detail, prepared in a simple and straight-forward manner.

Proposers are expected to examine the entire Request for Proposals, including all specifications, standard provisions, and instructions. Failure to do so will be at the Proposer's risk. Each Proposer shall furnish the information required by the Request for Proposal. Periods of time, stated in number of days, in this request or in the Proposer's response, shall be in calendar days. Propose your best price on each item.

**1.19 PRE-PROPOSAL MEETING**

A pre-proposal conference call is scheduled for February 13, 2015 -- 9:00 am – 11:00 am PST. This is a non-mandatory meeting, however, participation is recommended. University of Idaho participants will include staff members from Information Technologies Services.

Call information:

USA Toll-Free: 888-706-6468  
 USA Caller Paid: 215-446-0193  
 Participant Code: 4618250

**1.20 TERMS, ACRONYMS & DEFINITIONS**

<b>Terms</b>	<b>Definition</b>
Equipment	Includes onsite vendor-provided devices including IP handsets, gateways, call controllers, etc.
Manufacturer(s)	The company or companies that make the solution components and provide the Proposer with technical support and upgrades to the underlying systems.
Proposer	The entity that is providing a solution and pricing in response to this Request for Proposals. Proposer will be responsible for the successful implementation support of the solution.
Service Provider	The firm supplying the carrier services elements, although this may be the same company that is the Proposer in some situations.
Vendor	The proposing firm that is responsible for the solution. For purposes of this RFP, the terms Vendor, Proposer, and Contractor may be used interchangeably, although Proposer is limited to referencing potential Vendors (pre-award) and Contractor is specifically referencing the awarded Vendor.
<b>Acronyms</b>	
ACL	Access Control List
AD	Active Directory
ANI	Automatic Number Identification
ASA	Adaptive Security Appliance
CAT	Category
CDA	Coeur d'Alene
CDR	Call Detail Record
CGL	Commercial General Liability
CO	Central Office
DHCP	Dynamic Host Configuration Protocol
DID	Direct Inward Dialing
DNS	Domain Name System
DR	Disaster Recovery
E911	Enhanced 911
ERP	Enterprise Resource Planning application (Banner)
FAR	Federal Acquisition Regulation
FOB	Freight on Board
GUI	Graphical User Interface
IP	Internet Protocol
IRON	Idaho Regional Optical Network
ISC	Internet Systems Consortium
ISDN	Integrated Services Digital Network

ISP	Internet Service Provider
ISU	Idaho State University
ITS	Information Technology Services
LAN	Local Area Network
LAP	Lightweight Access Points
LLDP-MED	Link Layer Discovery Protocol – Media Endpoint Discovery
MAC	Media Access Control
MACD	Moves, Adds, Changes, and Disconnects
MPLS	Multiprotocol Label Switching
NARS	Network Access Register
NAT	Network Address Translation
NMS	Network Management System
PAT	Port Address Translation
PC	Personal (Desktop) Computer
PDF	Primary Distribution Frame
PoE	Power Over Ethernet
POP	Participant Operational Practices
POTS	Plain Old Telephone Service
PRI	Primary Rate Interface
PSAP	Public Safety Answering Points
PSK	Pre-Shared Key
PT	Port Address Translation
QoS	Quality of Service
RFP	Request for Proposal
SIEM	Security Information and Event Management
SIP	Session Initiation Protocol
SLA	Service Level Agreement
SOC	Switching Office Code
SSIDS	Service Set Identifiers
UC	Unified Communications
UCaaS	Unified Communications as a Service
UI	University of Idaho
UPS	Uninterruptable Power Source
VLAN	Virtual Local Area Network
VoIP	Voice Over Internet Protocol
VPN	Virtual Private Network
WLC	Wireless LAN Controllers
WPA2	Wi-Fi Protected Access II

**SECTION 2 -PROPOSER QUALIFICATIONS AND INFORMATION**

**2.1 CONTACT INFORMATION**

Provide contact information for the Proposer and any other components (describe) proposed as part of the solution

Proposer - core product/service		Email Address	Phone
	Account Representative		
	Contract Executive		
	Sales Engineer		
Additional components		Email Address	Phone
	Point of Contact		
	Point of Contact		

**2.2 PROPOSER INFORMATION**

Provide information for the following:

- A. Parent company (if applicable):
- B. State of incorporation:
- C. Federal identification number:
- D. Idaho business license number:
- E. Size of organization:
- F. Total number of installed base customers:
- G. Total number of installed base users licensed:
- H. How long has your solution been based on the proposed platform?
- I. Describe your certifications and credentials that indicate your expertise and commitment to a cloud solution practice. Also provide specific designations that identify specialty areas of focus and capability.
- J. Please provide a list and relationships of any other legal entities proposed in the delivery of these service.

**2.3 KEY PERSONNEL**

**2.3.1 PROPOSER PERSONNEL**

The proposal must include a list of project team members, including technical staff, available to service equipment at the customer premises, as well as at the hosted site, during and after the installation.

The University prefers to retain the same key personnel, including Proposer’s Project Manager and Software Engineer(s), over the length of the project. Any unavoidable changes in key personnel must be communicated to the University in writing with as much advance notice as possible.

Using the following table, provide a list of the proposed project team members. The list shall include the role and responsibility for each team member and any pertinent certifications they have obtained.

Specific roles that should be itemized include:

- A. Project Manager
- B. System Engineer (for each proposed system)
- C. Trainer

		Location	

**2.3.2 UNIVERSITY PERSONNEL**

Provide a list of team member roles, quantities of each, and the expected duration personnel are needed, to support the implementation of the service, that the University will need to dedicate to this project.

Role and Description	Quantity needed	Estimated effort and duration needed by role

**2.3.3 CUSTOMER REFERENCES**

The Proposer must submit a minimum of three (maximum of five) relevant customer references for which the Proposer has provided a similar solution within the last three years. The systems must be currently in full production use and be of similar size and complexity to the University. The solution must be presently in full production use (sales pending implementation of key components do not qualify). References of all Proposers may be contacted at any time throughout the RFP process.

Reference 1– Client Name:	State:	Type of Business:
Contact Name:	Job Title:	Phone Number:
System Replaced:	Email Address:	
Number of Users	When Implemented:	
Description / Notes:		

Reference 2 – Client Name:	State:	Type of Business:
Contact Name:	Job Title:	Phone Number:

System Replaced:	Email Address:	
Number of Users:	When Implemented:	
Description / Notes:		
Reference 3 – Client Name:	State:	Type of Business:
Contact Name:	Job Title:	Phone Number:
System Replaced:	E-mail Address:	
Number of Users	When Implemented:	
Description / Notes:		
Reference 4 – Client Name:	State:	Type of Business:
Contact Name:	Job Title:	Phone Number:
System Replaced:	Email Address:	
Number of Users:	When Implemented:	
Description / Notes:		

Reference 5 – Client Name:	State:	Type of Business:
Contact Name:	Job Title:	Phone Number:
System Replaced:	E-mail Address:	
Number of Users:	When Implemented:	
Description / Notes:		

## **SECTION 3 - TECHNICAL AND FUNCTIONAL SPECIFICATIONS**

The University of Idaho currently has multiple disparate telephone systems (five different telephone systems in use at the five in-scope locations) across the state which has resulted in unnecessary complexity and inefficiencies; multiple vendors, multiple contracts, multiple support systems, and multiple technologies. This variety of vendors, services, dial plans, features and functionality, etc., contributes to a perception of separation between University locations. We hope to change some of this perception by implementing a common (unified) communication system for all UI employees that:

1. integrates into other existing communications systems such as email and cell phones,
2. supports our Customer's requirements for telephone system functionality,
3. is more efficient and less costly to maintain, and
4. offers common services to everyone regardless of their location.

In many cases only a basic package of voice services will be required, but the proposed solution should also provide the University with the ability to add features and enhanced functionality over time.

Our plan for implementation includes a phased approach. Currently in the scope of this RFP, as the first phase, are the following locations in Idaho - Moscow (Main Campus), Coeur d'Alene, Post Falls, Boise, and Idaho Falls (Branch Campuses). The remaining University locations (approximately 40 small sites) will be upgraded, in a timeframe yet to be determined, after the initial rollout is complete.

After the initial implementation, the University envisions a continued evolution where advanced features and UC functionality will be deployed over time. In the future and where possible, the University will encourage alternative approaches such as soft-phones and mobile devices as a replacement for fixed telephone sets.

### **3.1 CURRENT ENVIRONMENT**

#### **3.1.1 CURRENT NETWORK AND INFRASTRUCTURE ENVIRONMENT**

##### **3.1.1.1 Network and Infrastructure – UI Moscow and UI Wide Area Network (WAN)**

- A. The University owns and maintains a comprehensive inter-building fiber infrastructure and owns all of the intra-building copper and fiber infrastructure. In-building copper is CAT 5E or better. It should be noted that the University does not own the existing inter-building telephony copper plant—it is owned by Frontier.
- B. Battery backup / UPS services are not provided to network equipment in network closets.
- C. The University of Idaho data network has a 10 Gbps backbone on the Moscow campus. The primary Internet connection on the Moscow campus is 10 Gbps and the diverse/redundant backup Internet connection is 800 Mbps. Most buildings on the Moscow campus have a 1 Gbps uplink to the core network, but some smaller buildings have one or more 100Mbps uplinks to the core. Most network closets have a single 1 Gbps Cisco Power over Ethernet (PoE) switch. Some closets have 100 Mbps HP Procurve PoE switches. Together, almost all of our approximately 185 network closets already have PoE infrastructure in place.
- D. Given that there is very little network congestion on the Moscow campus Quality of Service (QoS) has not been implemented.
- E. The Wide Area Network (WAN) consists primarily of Metro Ethernet service provided by Idaho Regional Optical Network (IRON) across the state of Idaho. The in-scope Boise, Coeur d'Alene, Post Falls and Idaho Falls campuses are connected to Moscow at 1 Gbps.
- F. WAN campuses do not have backup ISP connections at this time.
- G. The University Wireless Local Access Network (WLAN) is based on Cisco Wireless LAN Controllers (WLC), with lightweight access points (LAPs). The WLC is connected to the core network at 10 Gbps. The Moscow campus has over 1,000 LAPs in over 120 buildings, including University Housing and Greek living groups. All LAPs support both 2.4 GHz and 5 GHz bands. Most non-residential LAPs support 802.11N speeds. The WLC does not forward Layer 2 broadcasts. Multiple Internet Protocol (IP) subnets of 1024 IPs are used for wireless users. Different subnet pools are used for Staff and Faculty than for Students. There are three Service Set Identifiers (SSIDs) used on campus. The AirVandalGold SSID is using Wi-Fi Protected Access 2 (WPA2) Enterprise with 802.1X authentication and is only available in non-residential buildings. The AirVandalHome SSID is using WPA2 Enterprise with 802.1X authentication and is only available in residential buildings. The AirVandalGuest SSID is using WPA Pre-Shared Key (PSK) and is available everywhere, but has limited access to university services and limited Internet bandwidth. The WLC is managed with Cisco Prime Infrastructure. The WLC is in a high availability pair located in the primary and backup data centers.
- H. The University network firewall infrastructure is based on Cisco's Adaptive Security Appliance (ASA). Firewalls are connected to the core network at 10 Gbps. There are two contexts for the firewall. One firewall context is an access firewall. Most end-users subnets have the access firewall as the default gateway. The access firewall end-user

network policy allows all outbound connections, but no inbound connections from off subnet. This is the case for all wireless subnets and many wired subnets. The second firewall context is the border firewall. Most subnets, that do not have an access firewall or local router Access Control List (ACL), route through the border firewall to communicate with the Internet. By default the border firewall policy allows outbound access only to the Internet. It is possible to configure border firewall policy exceptions that allow Internet access to servers in these subnets. The ASA is managed with Cisco Security Manager (CSM). The Cisco ASA is in a high availability pair located in the primary and backup data centers. Our current ASA design does not support Multicast routing.

- I. The University of Idaho IP address management tool is a homegrown Network Management System (NMS). The UI NMS tool is used to register Media Access Control (MAC) addresses, Internet Protocol IP addresses and Domain Name System (DNS) names of all authorized devices on the UI network. The UI NMS pushes updated configuration files to the Internet Systems Consortium (ISC) dhcpd servers and ISC BIND servers, used for Dynamic Host Configuration Protocol (DHCP) and DNS services, respectively. The DNS and DHCP services are in a high availability pair located in the primary and backup data centers. At this time, the university does not use private address space, and therefore does not use Network Address Translation (NAT) or Port Address Translation (PAT), or split DNS. As part of this project, the NMS will be updated to support private address space for a VoIP handset deployment at the Moscow Campus. PAT or NAT would need to be implemented if traffic to/from private address space needs to be routed outside the UI network. The university has a class B IP version 4 network. The university has not yet acquired an IP version 6 (IPv6) address assignment and we do not route IPv6.
- J. The University offers Virtual Private Network (VPN) services to end users using a Cisco ASA and Anyconnect clients. The selected proposer would be eligible for accounts to use with the University's VPN service. The Cisco ASA is in a high availability pair located in the primary and backup data centers.
- K. 85 buildings and 185 wiring closets

### 3.1.1.2 Network and Infrastructure – UI Coeur d'Alene

- A. 1 Gbps Metro Ethernet connection, provided by IRON, to the main campus in Moscow.
- B. CAT 5E or better copper wiring.
- C. Battery backup / UPS services are not provided in network closets.
- D. All network-connected devices are registered to the University's Network Management System and use the University's central DHCP and DNS services.
- E. Power over Ethernet is available in all network closets.
- F. Network switches are Cisco and/or HP products.
- G. Redundant WAN connections are not in place.
- H. With current bandwidth availability and usage, congestion is not an issue and therefore QoS is not in place.
- I. 1 building and 3 wiring closets

### 3.1.1.3 Network and Infrastructure – UI Post Falls

- A. 1 Gbps Metro Ethernet connection, provided by IRON, to the main campus in Moscow.
- B. CAT 5E or better copper wiring.
- C. Battery backup / UPS services are not provided in network closets.
- D. All network-connected devices are registered to the University's Network Management System and use the University's central DHCP and DNS services.
- E. Power over Ethernet is available in all network closets.
- F. Network switches are Cisco and/or HP products.
- G. Redundant WAN connections are not in place.
- H. With current bandwidth availability and usage, congestion is not an issue and therefore QoS is not in place.
- I. 1 buildings and 2 wiring closets

### 3.1.1.4 Network and Infrastructure – UI Boise (Water Center)

- A. 1 Gbps Metro Ethernet connection, provided by IRON, to the main campus in Moscow.
- B. CAT 5E or better copper wiring.
- C. Battery backup / UPS services are not provided in network closets.
- D. All network-connected devices are registered to the University's Network Management System and use the University's central DHCP and DNS services.
- E. Power over Ethernet is available in all network closets.

- F. Network switches are Cisco and/or HP products.
- G. Redundant WAN connections are not in place.
- H. With current bandwidth availability and usage, congestion is not an issue and therefore QoS is not in place.
- I. 1 building and 13 wiring closets

### 3.1.1.5 Network and Infrastructure – UI Idaho Falls

- A. 1 Gbps Metro Ethernet connection, provided by IRON, to the main campus in Moscow.
- B. The LAN in Idaho Falls is scheduled for a forklift upgrade in 2015 and will be completed before a UC implementation.
- C. CAT 3 or better copper wiring.
- D. Battery backup / UPS services will not be provided in network closets.
- E. All network-connected devices will be registered to the University's Network Management System and use the University's central DHCP and DNS services.
- F. Power over Ethernet will be made available in all network closets.
- G. Network switches will be Cisco and/or HP products.
- H. A redundant WAN connection may be in place, but dial tone survivability will still be required.
- I. With current bandwidth availability and usage, congestion is not an issue and therefore QoS is not in place.
- J. 3 buildings and 4 wiring closets

## 3.1.2 CURRENT TELEPHONY ENVIRONMENT

### 3.1.2.1 Telephony – UI Moscow

- A. The University's campus in Moscow utilizes CentraNet services, including voice mail, provided by Frontier.
- B. The majority of Moscow's approximately 3,200 telephone sets are single-line analog, with a smaller percentage of ISDN digital phones for users that require multi-line appearances and enhanced features. The make and model of analog handsets is extremely diverse with many end users having selected and purchased their own instrument.
- C. Approximately 150 additional lines are provided by an Avaya Communications / Modular Messaging system maintained by University's Information Technology Services. This system was installed as a VoIP pilot project 3 years ago.
- D. 5-digit dialing is in place between the Centranet (legacy) and Avaya (VoIP) systems. Any distinctions between the two systems are transparent to the customer.
- E. A block of 10,000 DID numbers, owned by Frontier communications and leased by UI, are currently available for UI to use and assign.
- F. Local services to Moscow and surrounding communities are provided, toll-free, by Frontier Communications on a community-plus trunking plan.
- G. Long distance service is provisioned by Century Link communications. Long distance is handed off to Century Link from the Frontier Central Office (CO) located in Pullman, WA.
- H. All University telephony moves, adds, changes, and disconnects (MACD's); telephone-related service calls; troubleshooting; repairs; and other issues are coordinated between UI Information Technology Services (ITS) staff and Frontier.
- I. Invoicing for telephone services, billing issues, credit requests, account setups, and other financial-related services are coordinated between the University ITS staff and Frontier.
- J. University telephone charges are downloaded and collated within ITS and distributed to University departments through a third-party tele-management application.
- K. Although the University has fiber cabling in place to connect the data networks for VoIP transport, any analog-based services will need to be served via in-building gateways, except where Frontier POTS / business lines are utilized.
- L. The University will separately contract for approximately 100-300 legacy POTS phone lines for "life safety" applications, elevators, fire alarms, residential, and courtesy phones.

### 3.1.2.2 Telephony – UI Coeur d'Alene

- A. Telephone service is provided by the same Avaya Communication Manager pilot project mentioned above. Approximately 60 phone lines are connected to a local survivable call processor and to the main Avaya system in Moscow via a Gigabit Ethernet WAN connection.

- B. A local PRI circuit provides access to local phone numbers (inbound and outbound, including life safety and 911) and serves as a failover connection when the primary WAN connection is offline.
- C. 5-digit dialing is configured between Moscow, Coeur d'Alene and Post Falls – the sites using the Avaya system. Calls to the Moscow community are toll free from Coeur d'Alene.
- D. UI is leasing the DID numbers in use from Frontier.
- E. In-building copper wire is owned by UI and is CAT 5E or better.
- F. All telephone service requests, billing, provider coordination, etc. are performed by University ITS staff in Moscow.

### 3.1.2.3 Telephony – UI Post Falls

- A. Telephone service is provided by the same Avaya Communication Manager pilot project mentioned above. Approximately 3 business-class phone lines are connected to a local survivable call processor and to the main Avaya system in Moscow via a Gigabit Ethernet WAN connection.
- B. The business-class lines provide access to local phone numbers (inbound and outbound, including life safety and 911) and serve as a failover connection when the primary WAN connection is offline.
- C. 5-digit dialing is configured between Moscow, Coeur d'Alene and Post Falls. Calls to the Moscow community are toll free from Post Falls.
- D. UI is leasing the DID numbers in use from Frontier.
- E. In-building copper wire is owned by UI and is CAT 5E or better.
- F. All telephone service requests, billing, provider coordination, etc. are performed by University ITS staff in Moscow.

### 3.1.2.4 Telephony – UI Boise

- A. The University campus in Boise receives its telephone services from both Boise State University and the State of Idaho IT departments, located in Boise. Boise State University provides most but not all of the phone lines in use at UI Boise, the remainder are provided by the State of Idaho. BSU provides long distance services, DID's, trunking, voice mail, telephone instruments and MACD's. The State of Idaho provides trunking, DID's, repair and long distance services from Century Link and optional voice mail services.
- B. There is no common dialing plan between these systems and other UI telephone systems. Calls from Boise to other UI locations are long distance as are calls made to UI Boise.
- C. Local survivability services are not currently in use in Boise.
- D. DID's are included in the service provision.
- E. In-building copper wire is owned by UI and is CAT 5E or better.
- F. All telephone service requests, billing, provider coordination, etc. are performed by University ITS staff in Moscow.

### 3.1.2.5 Telephony – UI Idaho Falls

- A. Local telephone services are primarily provided by Idaho State University (ISU). There are some telephones and service provided by the State of Idaho.
- B. Telephone systems are tightly integrated into a business model which emphasizes a seamless appearance between ISU and UI services.
- C. DID's are included in the service provision.
- D. There is no common dialing plan between this system and other UI telephone systems. Calls from Idaho Falls to other UI locations are long distance as are calls made to UI Idaho Falls.
- E. In-building copper wire is owned by UI and is CAT 3 or better.
- F. All telephone service requests, billing, provider coordination, etc. are performed by UI staff in Idaho Falls, except for State of Idaho-provided telephone services which are coordinated by UI staff in Moscow.

## 3.1.3 CURRENT COMPUTING ENVIRONMENT

The University of Idaho hosts a diverse computing environment. Some services such as networking, data center management, and data storage are mostly centralized while support for desktops and application licenses are more decentralized. While Information Technology Services (ITS) offers services such as desktop purchasing and support, some departments purchase, manage, and maintain their own desktop devices and even some servers.

For desktops, employees have University-owned equipment running currently supported Microsoft Windows and Apple OS X operating systems. ITS is the central IT support group for the University, owning Active Directory and Service Center Configuration Manager. These systems are utilized by only some of the desktop computers at the University, as connection to these services is not required in practice or policy.

ITS offers Office 365 as the primary productivity, email, and collaboration tool. UI also is utilizing some other Microsoft hosted solutions, although not currently utilizing Azure for Active Directory services. The current environment is not favorable for easy installation and maintenance of software clients on equipment other than those few managed within the Service Center Configuration Manager.

### 3.1.3.1 Desktop Operating Systems

The most recent version plus one prior version are supported by the University (currently Windows 7, Windows 8+, OS 10.9, and OS 10.10).

### 3.1.3.2 Directory Services

Load-balanced Active Directory domain controllers provide directory information for ITS-based services. Less than half of all UI-owned computers are joined to the domain and use Active Directory for authentication. Group Policy is available for trusted computers, but with very limited use institutionally. Other services use a combination of LDAP authentication and federation (see below).

### 3.1.3.3 Identity and Access Management

Active Directory Federated Services maintains trusts with aggregate service providers (SPs). The University is a member of InCommon and has published Participant Operational Practices (POP).

See: <https://webpages.uidaho.edu/incommonpop/incommonpop.pdf>

### 3.1.3.4 Office 365

This is the University's choice for messaging and collaboration services via a Microsoft hosted model for all students, faculty and staff. Supported features include email, calendaring, address books and contacts, instant messaging and collaboration, and OneDrive for Business/SharePoint Online.

### 3.1.3.5 System Center Configuration Manager

Approximately 1300 University computers, including most student computing lab computers, are fully managed through Configuration Manager. This is less than half of all domain-joined computers and less than a quarter of all University-owned computers.

### 3.1.3.6 Portable/Mobile Devices

The University looks forward to the possibilities of on-network wireless offerings in the future. Today, we support Android, Windows, and iOS devices as long as features include industry standard technologies such as wireless a/g/n, 802.1X authentication, activesync, SSL, etc. The University does not have standardized mobile device management for University-owned or personal devices.

### 3.1.3.7 VPN

The University provides Cisco AnyConnect VPN client for multiple devices. Publicly routed dynamic and static IP addresses are available.

## 3.2 DESIRED ENVIRONMENT

The technical requirements below are purposely described in fairly broad terms. UI is providing basic and essential information so that Proposer can get an understanding of what we are looking for in a cloud-based Unified Communication service. Proposers are encouraged to ask for clarification as needed. UI is open to innovative solutions - use your expertise and experience to apply creativity to design a solution that exceeds our expectations.

### 3.2.1 INFRASTRUCTURE / ARCHITECTURE / SYSTEMS / NETWORK

We are looking for a cloud-based / hosted service that can provide uptime / availability similar to a local PBX. We understand that a robust systems and network infrastructure is necessary to provide a high quality UCaaS service. We want the Proposer to describe the multiple aspects of Proposer's underlying architecture that allow Proposer to prevent, predict, minimize and resolve system events and outages while simultaneously providing a service with excellent / scalable performance and capacity.

#### 3.2.1.1 Reliability and Availability

- A. Describe how you maintain high levels of service reliability and availability. Please differentiate network architecture from systems architecture, while also including factors that are common to both. For example, geographically diverse data centers, redundant network connectivity, redundant carrier connectivity, shared or dedicated tenant resources, mature internal processes for planned maintenance, systems monitoring, capacity planning, diverse pathway, multiple upstream providers, etc.
- B. Provide uptime statistics and details on the root cause of any significant service interruptions over the past 2 years.

### 3.2.1.2 Failure Scenarios

Describe how the proposed service will be impacted in the following failure scenarios:

- A. Upstream Service Provider failure
- B. Primary data center failure
- C. Denial of Service attack
- D. DNS failure
- E. UI primary Internet Service Provider failure
- F. UI primary data center failure
- G. UI WAN connectivity failure for one or more WAN sites
- H. Network failure in or between UI buildings
- I. UI email environment offline

### 3.2.1.3 Performance

Describe how you ensure that the proposed service remains responsive and scalable. For example, deterministic networks, QoS, dedicated/private networks, peering agreements, monitoring, capacity planning, etc.

## 3.2.2 NETWORK INTEGRATION

### 3.2.2.1 Integration

Proposer's solution will need to integrate into the existing UI network infrastructure.

- A. UI is working under the assumption that the proposed solution will work with existing UI network equipment. Point out any exceptions to this assumption.
- B. UI needs Proposer to develop a comprehensive list of recommended or required UI network capabilities and changes. At a minimum we are looking for your input on the following: VLAN, QoS, stateful firewall configuration, private network peering, DHCP and DNS, IP subnets, location information (E911), IP addressing and routing.
- C. Describe your process for managing a robust end-to-end network service/infrastructure where a significant portion of that network (UI LAN and WAN) is not under Proposer's direct control.

## 3.2.3 TELEPHONY

UI realizes that there are hundreds of telephony features available on the current generation of systems and most of them work similarly from manufacturer to manufacturer. We are interested in learning about the telephony features and characteristics that your solution offers that distinguishes it from competitors' solutions.

We need flexibility in regards to which UCaaS features are offered to our customers and when they are offered. Given fixed resource levels we need to control the pace at which "advanced" functionality is implemented. We want to start with the basics, and do them well, before offering advanced features to all University employees. For example, during implementation we expect to provide all current telephone users with a physical IP handset as opposed to migrating some users to softphones.

### 3.2.3.1 System-Level Features and Functionality

- A. Describe how you make any applicable system-level features and functionality accessible to persons with disabilities.
- B. Interoperability / coexistence – Your solution must coexist with the existing Centranet system in Moscow for the duration of the Moscow cutover. At a minimum you will need to support 5-digit dialing and ANI between the Centranet system and your solution. We expect cutovers outside of Moscow to be flash cuts and therefore do not expect a need to interoperate between old and new systems at these locations. Describe how Proposer will meet these expectations.
- C. Analog Devices – In your response, keep in mind that we differentiate between "POTS" and "analog". As stated previously mentioned, we will maintain a separate POTS contract for critical phone lines. These critical (POTS) lines cannot traverse an IP network and cannot rely on local / commercial building power and are therefore outside the scope of your response. The analog lines for which we need you to provide a solution are non-critical and can be

offline if the IP network or building power is unavailable. Examples of analog lines are fax machines and speakerphones.

- i. Describe what it will take to supply dial tone to analog devices such as fax machines and speakerphones. As previously described, UI does not own copper infrastructure between buildings.
- D. Call Logging and CDR – How are call log data and call detail records made available to us? For example, real time or batch downloads, available for download, sent to UI logging host, etc.
- E. Reporting – Describe the reporting environment available to UI. For example, web-based, utilization statistics, errors, etc.
- F. Trunking Requirements –
  - i. Provide information on how your included trunking solution will meet our current and future needs. How do you calculate the number of trunks required? What assumptions do you make as part of this calculation?
  - ii. What options and limitations does UI need to consider?
- G. ACD / Call Center – A few UI departments could benefit by implementing (basic) call center functionality. Provide a description of the ACD/Call Center functionality of your product.
- H. Basic features filtering – Describe the ability of your system to limit the quantity and type of end-user features provisioned to individual handsets such as courtesy phones in public areas. For example, templates, Class of Service, groups, etc.
- I. Voicemail / Unified Messaging –
  - i. Provide a detailed overview of your voicemail product including its integration with our hosted Microsoft Office 365 (Exchange) email environment.
  - ii. Is user-level granularity available for deciding if voicemail is kept on the telephony system or sent to email?
  - iii. Describe the functionality your product offers for voice-to-text transcription of voice mail messages.
- J. Conferencing – The University would prefer that the full capabilities of an audio conferencing (bridge) suite be included with your solution. Please describe the features, options and capacity of your solution.
- K. Toll-free Calling – The preferred solution would have unlimited toll-free calling, similar to cellular phone calling plans.
  - i. Describe the features and limitations of your inbound and outbound toll-free calling. For example: local only, US only, North America only, international, etc.
  - ii. Will UI need to maintain an agreement with a separate long-distance carrier?
- L. Toll Calling – How do you maintain competitive toll call rates and how do you differentiate yourselves from your competitors on those rates?
- M. Toll Call Blocking – Describe how your service offers configurable toll call blocking options. For example - blocking of toll calls at a default per line level, requiring a PIN for toll calls, inbound collect call blocking, blocking inbound 3rd-party calls, etc.
- N. ANI – Outbound ANI must be controlled and customizable by Class of Service and by individual line. Inbound ANI data must be available to peripheral devices, including voicemail systems and analog extensions.
- O. Local / DID number porting – We need you to port our existing local/DID numbers into your solution. In all locations, except Idaho Falls, migrated users will be keeping their current phone numbers.
- P. 800 service porting – We will need you to port our existing “1-800” numbers and services into your solution.
- Q. Survivability – We expect dial tone survivability to be implemented at each site. Describe the capabilities and options of your solution in providing local dial tone survivability when a site’s external network is offline.
- R. E911 and Location – We will prefer a solution where comprehensive E911 services are integrated.
  - i. Provide details on your recommend E911 solution including, 911 & 9-911 (or other leading digit dialing) support, maintenance of databases, processes for transferring location information, processes for keeping location information updated, validation of location information, monitoring of 911 calls by University safety staff, etc.
  - ii. How will E911 location information be collected from the UI environment? Include information for handsets, softphones, and wireless handsets
- S. Paging / Intercom –
  - i. Describe how your solution allows paging/intercom functionality through the IP handsets.
- T. Directory – The ideal solution will integrate with UI’s Active Directory.

- i. Describe the directory services your solution provides.
  - ii. Does your solution integrate with Active Directory? If so describe the requirements to implement and the benefits.
- U. Attendant Consoles – Provide a description of the options available to support attendant consoles.
- V. Hosted Fax Service – UI currently has at least 200-300 analog fax devices in use. We believe that many of these devices/lines could be removed from service (saving money) if your solution offers an acceptable virtual / network-based fax alternative.
  - i. Describe the network-based fax service that is included with your solution. How would it integrate with our current email system?
  - ii. Does it support sending faxes directly to employee's phone numbers?
  - iii. What options are available for routing inbound faxes?
  - iv. Describe outbound fax features and requirements from the perspective of desktop and mobile clients.
- W. Toll Fraud – Describe the ability of your solution to prevent toll fraud, and your processes for working with the customer to prevent unauthorized charges.
- X. Texting – Describe how your system supports SMS texting. For example: service users receiving text messages through their desktops, e-mail, or handsets; service users sending SMS text messages from their desktops, e-mail, or handsets, etc.

### 3.2.3.2 User-Level Features and Functionality

- A. Describe how you make end-user features and functionality accessible to persons with disabilities.
- B. Handsets – Describe and present options for at least 3 tiers of IP handsets; basic, advanced and receptionist/operator.
  - i. What are the features of your handsets that set them apart from the competition?
  - ii. Do you recommend and support 3<sup>rd</sup> party handsets?
  - iii. Our desired setup is to use IP handsets as a pass through network connection for the user's desktop computer. Most handsets could be rolled out with a 100 Megabit computer port but some users will require Gigabit.
  - iv. Handset costs will be a significant factor in our determination as to which handset we select as our standard.
- C. Handset network-focused details –
  - i. Describe how the VoIP handsets determine the Voice VLAN they should be using. Which method is recommended/preferred: DHCP, LLDP-med, or other?
  - ii. What are the power requirements of the recommended handsets?
  - iii. Describe the IP handsets ability to communicate its capabilities to the PoE switch (for example, LLDP-MED).
  - iv. Describe how the IP handsets obtain their configuration and any required options.
- D. Cordless Handsets / Wireless Headsets – We will prefer options that support industry-standard wireless protocols and non-proprietary hardware. What options are available for phone users who prefer a cordless handset or wireless headset?
- E. Mobile and Remote Teleworker Access – Describe how your solution supports employees who are working away from their primary workspace, either on campus or off campus and not using the UI network. For example, UI is very interested in learning about how your product integrates with personally owned cell phones, how remote workers outside of the UI network could utilize your solution, etc. How does your solution ensure that related network traffic is secure?
- F. Soft phones - UI does not plan to offer softphone client functionality to our customers as part of this project but need to understand your solution. Tell us about your softphone solution. Describe what it will take to roll out and support soft phone clients in our environment. FYI, our previous informal softphone testing was unsuccessful due to stateful firewall traversal and VLAN issues. Also, describe how your solution provides support for 3rd party softphone client software.
- G. Wireless - Voice traffic over WiFi is not a requirement for this project but we are interested in your recommendations for what would be required to support your service on our wireless network. We assume that our current wireless network infrastructure, which does not utilize QoS, is not capable of supporting guaranteed quality voice traffic.
- H. Speakerphones - UI currently uses and may continue to deploy high-quality, expensive analog speakerphones in conference rooms and large offices. What are your recommendations regarding speakerphones? For example, would you recommend converting all existing speakerphones to IP, continue to support existing speakerphones via analog gateways, etc.?

### 3.2.4 SECURITY

The proposed solution must be adequately secured to comply with Federal and State laws and regulations as well as meeting accreditation and University requirements.

- A. Describe how physical access to the data center(s) is controlled?
- B. What security measures will be taken to protect University data?
- C. Describe the written policies, procedures, and methods for ensuring security.
- D. Explain the proposed solution's response to applicable state and federal laws, including and specifically addressing CALEA compliance, and explain how you maintain compliance with privacy rules & regulations (such as the Privacy Act of 1974, PCI, HIPAA, etc.).
- E. Is the encryption used in this system on either hardware or software phones restricted from use in countries outside the United States?
- F. Indicate where data centers are located or any place where you store customer data, include any locations outside the United States.
- G. Do you provide a separate written Service Level Agreement that covers security concerns, risks, and liability coverage? If so provide a sample.
- H. Do you provide encryption of all stored data? Indicate types of encryption and where used.
- I. Can all media packets (voice, video, IM, etc.) in transport be encrypted? Describe the encryption solutions used.
- J. Who has access to any decryption keys and how are they secured?
- K. What types of operating systems are running on the servers and how do you secure them from exploits?
- L. What is in place to prevent device-level exploits? This should include any locally installed gateways, data-storage devices, and the telephones (including soft phones).
- M. What are the software update mechanisms for installed gateways, data-storage devices, and telephones (including soft phones)? How is the update mechanism resistant to person-in-the-middle attacks? What is the support lifecycle for product enhancements or bug fixes?
- N. What type of security exists within the applications to prevent abuse and malicious activities?
- O. What security measures are in place to provide secure access to authorized University staff that need to access the system's management tools?
- P. How do you protect the services from standard IP vulnerabilities, including person-in-the-middle and denial-of-service attacks?
- Q. What are the firewall traversal requirements (applications, ports and protocols) for the service?
- R. Explain the frequency of third party audits of the systems and processes of the proposed solution. If possible, please include the results of the latest SOC 2 type 2 audit.
- S. For cloud services, please provide the assessment results of a Cloud Security Alliance Cloud Controls Matrix version 3.0 or better, or equivalent documentation.
- T. Describe the electronic discovery and retention capabilities of the proposed solution including user or centrally instigated voice mail retention policies and the ability to administratively extract voice mail messages (for example, as part of a Public Records request facilitated by the University).
- U. Describe the logging capabilities of the service for both administrative changes and normal use.
- V. Describe the retention time available for system logs and call detail records and how are they made available for integration into external logging facilities (Syslog, SIEM tools) or for export.

### 3.2.5 SYSTEM SUPPORT / MAINTENANCE

The University support staff's goal is to provide superior customer service to the service users. UI's team will best be able to meet this goal by working in a collaborative and cohesive partnership with all parties involved in delivering the proposed service. Part of our excellent customer service strategy is being able to give timely, informative, and thorough messages to service users. It will be vital to our success that all available information be shared between UI and the service providers as soon as it is known.

The service providers must be willing to work with open-lines of communication and deliver a responsive, caring attitude in their customer service. Proactive, meaningful communications and easily understood information is critical to our customer's satisfaction.

UI is new to supporting UCaaS and the Proposer is invited to offer suggestions on best practices for organizing and developing a support function for UCaaS at UI.

The University requires:

- A. A clear understanding of the responsibilities of the service(s) providers and the University
- B. Documented accountabilities of all companies involved in delivering the service(s)
- C. Collaborative, cohesive, and timely responses from all service(s) providers
- D. On demand status information that is current and meaningful
- E. Open lines of communication and freely flowing information in both directions
- F. Scheduled reports delivered by Proposer to the University showing Service Level Agreements are being fulfilled

### 3.2.5.1 Monitoring and Notifications

The ideal solution will include monitoring and notifications alerting University support staff of service issues upon start of an event.

- A. Describe your support and troubleshooting process, including expectations of University.
- B. Provide details on time-based support levels. For example, business hours, 24x7, weekends, etc.
- C. Describe the system monitoring and performance monitoring tools included in the proposed service and which if any, the University support staff will have direct access to view.
- D. Describe any API's you have allowing custom interfaces or third-party interfaces for monitoring and notifications.
- E. Describe how the University and users are notified by the service provider of status changes (i.e. – event, outage, etc.) in the proposed service.
- F. Describe how you inform customers of planned service changes, new service offerings, and other upcoming service events.
- G. Describe how you monitor call quality. For example, distracting noise, echo, pops, delays, etc.

### 3.2.5.2 Web-based Interface for System/Account Administration

The ideal solution would provide a GUI interface for administration of user-level telephony configurations.

- A. Describe your philosophy and approach with customers that prefer to take a selective but active role in the management and maintenance of their telephone environment.
- B. Describe what interface(s) the proposed service will provide the University for performing administrative tasks. For example, building and modifying station programming, call routing rules, user groups, report generation, etc.
- C. Describe how the proposed service supports tiered access permissions for administrators, site coordinators, users, etc.
- D. Describe what the proposed service offers to handle preprogramming of tasks and which types of tasks can be scheduled to execute later (typically during off-hours).
- E. Are any other management tools provided, such as online access to billing, usage reports, CDR exports, APIs, etc.? Describe the portals available to obtain such information.

### 3.2.5.3 Change Management/Trouble Tickets

- A. Describe what the proposed service offers for submitting and managing University and Proposer-generated change requests (MACDs), service requests, and trouble tickets.
- B. Describe how the Proposer will communicate and track requests for support from the University for Proposer's on-site equipment.
- C. Describe the capabilities of the interface or supporting system for escalation routing and notification rules.
- D. Describe any API's you have for third party software. For example, problem ticket systems, systems event logging, other customer-owned software, etc.

### 3.2.5.4 Roles / Responsibilities / Accountabilities

The University of Idaho has locations across the state at urban and rural sites that can make support challenging. Further challenges lie in UI's newness in supporting a UCaaS solution. As stated above, our goal is to have superior customer service and to that end it will be critical to have smooth transitions in support and a clear understanding of how the Proposer's staff and UI support staff will collaborate across points of demarcation.

To understand the expectations for support between the UI support staff and the support outlined in the proposed service, the Proposer should describe and be as thorough as possible in explaining their roles, responsibilities, and accountabilities as well as the Proposer's expectations of UI staff included in the proposed service offering.

- i. Non-intrusive monitoring of system status end-to-end.
  - ii. Notifying University support staff of system status changes, planned updates/changes.
  - iii. Receiving and acting upon MACD requests.
  - iv. Engineering and design for future deployments.
  - v. Troubleshooting and advanced diagnostics.
  - vi. Providing training and documentation for trainers, support staff and users.
  - vii. Service responses as identified in the Service Level Agreement.
- B. Following initial implementation, we anticipate University support staff may be responsible for:
- i. University on-premises LAN and WAN design, maintenance, and support.
  - ii. Wiring from on-premises closets to service end-point user devices.
  - iii. Delivery of end-point user devices from local University storage to user locations.
  - iv. Initial provisioning, device moves, minor configuration changes, first-line support.
  - v. Communications with UI customers.
  - vi. On-premises basic troubleshooting/replacement of user end-point devices.
  - vii. On-premises troubleshooting and repair of device connectivity and LAN configurations.
  - viii. On-premise user training/documentation on feature usage and device/service configuration.
- C. Provide information on the following:
- i. Describe your expectations of the University during end-point deployment management, including tools and processes.
  - ii. Describe how you assist an organization that is new to supporting UCaaS. For example, what roles and how many staff are needed at the University to support the service?
  - iii. Describe what your support would include, specifically any support services Proposer will provide above and beyond the stated responsibilities above.
  - iv. Define the typical point of demarcation of support provided by University versus Proposer. Describe how we will work together to smoothly provide superior customer service across that boundary.

### 3.2.5.5 Invoicing

The University currently uploads and compiles the charges from monthly invoicing from multiple telephony providers into Calero's enterprise communications management solution, Pinnacle. Pinnacle contains individual charge detail and associated university accounting information, by telephone number. Pinnacle collates the charges and then feeds account totals into Banner, the university's ERP system. The individual charge detail is contained within Pinnacle for detail report retrieval by university fiscal staff. This process is not expected to change. The ideal solution provides intuitive tools for reconciling discrepancies between Proposer's solution and the University's applications.

The proposed solution must satisfy the following requirements:

- A. Monthly service invoices must be available in two formats:
  - v. A regular invoice format with invoice number, date, account number, current month summary recap (with totals), high-level summary detail (with sub-totals and totals), and a previous activity recap/account recap with beginning, current month activity, and ending balances. This should be an electronic file such as a .pdf file.
  - vi. Electronic, downloadable or retrievable files (flat file, .csv, etc.)
    - a. Detailed line accounting of each charge by telephone number. This would include all recurring and non-recurring--non-usage charges. These charges should include description and amount of monthly line charges, taxes, support, etc.
    - b. Detailed call detail record (CDR) files of toll call usage. The detail must include for each call, the calling number, called number, date of call, location of called number, time of call, duration of call, and amount charged for the call

Please provide the following information:

- A. Describe any billing reports that are available through your application. Include what information they provide, for what circumstances they would be useful, and how they are retrieved or viewed.
- B. If UI identifies a need for a report that isn't currently available, describe the process for obtaining that report.
- C. Describe how we can access active and inactive records to validate invoicing in-service dates, work order information,

- D. Describe your process for invoicing your customers, including the day of the month your invoicing is performed, how your invoice is sent, the invoicing begin and end dates, if service charges are in advance or arrears of the service, etc.
- E. Describe your process for handling invoicing discrepancies, including the contacts to resolve discrepancies, your escalation process, etc.
- F. Describe your process for requesting and receiving credits, including forms or formats required, deadlines, etc.

### 3.2.5.6 Service Level Agreement

The service level agreement (SLA) needs to define the business expectations and working relationship between UI, Proposer, and all parties of the service. It is expected that Proposer will work with UI and the service providers to arrive at a single SLA. The SLA must provide a measurable framework for your service and must provide clarity in items such as the request/event prioritization, an agreed upon level of downtime, support response and resolution times, etc. UI expects a service performance tracking mechanism where the performance of the service is measured and reported.

- A. Proposer must provide a Service Level Agreement (include with the proposal as an attachment). Describe your service level guarantee for all areas of service.

For example:

- i. System availability
- ii. Latency
- iii. Packet loss
- iv. Jitter
- v. MOS
- vi. Repair/event resolution target (time)
- vii. Alarm response times
- viii. Response time for maintenance (incl. MACD), etc.
- ix. Escalation processes and timeframes
- x. Definition/prioritization of major and minor events and alarms
- xi. Monitoring for carrier local loop
- xii. Call setups per second
- xiii. Security protection of the University data
- xiv. Definition of problem/request priorities and issue escalation
- xv. Frequency of software upgrades
- xvi. Policy for software patches
- xvii. Engineering and technical support for University staff and field technicians
- xviii. Maintaining of local dial-tone survivability

Provide information for the following:

- A. Provide an example of a Service Level Agreement you have used in a similar previous engagement.
- B. Describe your service response procedure, including turn-around times, major/minor event definitions and alarms, service requests, request/event prioritization, etc.
- C. Describe how latency, packet loss, uptime and availability are calculated.
- D. Describe your process for calculating/measuring performance degradation and call quality. Describe the level at which degradation is considered an outage/downtime.
- E. Describe the consequences to Proposer for SLA violations. Describe the process of resolution with potential compensation for SLA violations.
- F. Describe what types of performance measuring and monitoring tools are included. Describe those tools and reports to which the University staff will have direct access.
- G. Describe your service performance reporting mechanism where the performance of your service is measured and reported.
- H. University has many urban and rural locations across the state of Idaho and the Proposer should be prepared with options to support their equipment at each University site. Describe your recommendation for providing rapid response to service requests, outages/repairs, and service expansion at our locations.

### 3.2.5.7 Upgrades – Hardware, Software, and Firmware

- A. Describe the process for hardware, software, and firmware (handset) upgrades. For example, frequency of updates, notification process, how interruption of service is avoided, flexibility for individual customers to stay on an older release if needed or preferred, etc.
- B. Describe your expectations of the University during the process of hardware, software, and firmware upgrades.
- C. Describe how you determine the need for and the process used to patch security vulnerabilities.
- D. Describe how you determine content for future releases. For example, inclusion of customer requests, etc.
- E. Do you allow or support any third-party enhancements to the solution? Describe any limitations.

## 3.3 PROTOTYPE SYSTEM FOR TESTING AND EVALUATION

### 3.3.1 PROTOTYPE BUILD

Proposer must work with UI to build a prototype environment which will be used for comprehensive testing and evaluation of the proposed service's features and functionality.

#### 3.3.1.1 Prototype Timeframe

Below are the scheduled dates relative to notification, prototyping, and presentations:

- March 13 – Proposals evaluated and finalists selected; Results and notification to all vendors.
- March 16 – Finalists will begin working with UI technical staff to build a functional prototype service.
- March 27 - All prototype build work must be completed.
- March 30 thru April 6 – Finalists will be on-campus for presentations to RFP evaluation team.

#### 3.3.1.2 Prototype Scope

Selected Proposers will be expected to build a prototype UCaaS environment to be used for testing and evaluation by UI's RFP selection team. Although basic testing can be accomplished very simply with a handset connected to your cloud-based service we need you to tell us what is required to test the full functionality and feature set offered by your solution.

- A. The prototype environment will be built in Moscow with only a limited number of handsets needing to be provided to each of our other in-scope locations.
- B. Provide a description of the full-featured prototype system that you could provide within the 2 weeks provided for the build. Include a list of proposed features and functionality that can and cannot be included in the prototype. For example; E911, onsite equipment, local dial tone, local survivability, Centranet interoperability, analog gateways, trunking, web-based management/support interface, speakerphones, handsets, headsets, etc.
- C. Propose alternate solutions for testing and evaluation of an important feature or function if it cannot be built into the prototype environment.
- D. Describe any general preparatory tasks UI must accomplish prior to the prototype build.

#### 3.3.1.3 UI Resources

UI has limited technical staff available to provide direct assistance during the prototype build and you must be aware that they may be working with more than one Proposer during this time period.

- A. Describe the type of assistance and number of hours you expect you might need from UI technical staff during the prototype build.

### 3.3.2 PRESENTATION

During the week of March 30<sup>th</sup> notified Proposer(s) will need to be onsite in Moscow, Idaho for one full day of presentations and discussions with the RFP selection team and other UI technical staff and customers. Your presentation and discussions will include components such as: proposer overview, general service/solution overview, features and functionality overview, service alignment with UI needs, technical/network breakout session, handset and end-user functionality breakout session, support breakout session, etc.

One week before your presentation, UI will provide a specific list of topics, use cases, or scenarios UI would like included in your presentation/discussion.

**SECTION 4 - GENERAL**

**4.1 INDUSTRY POSITION**

Discuss the Proposer and the manufacturer's (if different) position in the telecommunications industry, recent and planned acquisitions, and relative market share with other industry leading UCaaS vendors.

**4.2 LONG-TERM ROAD MAP**

Describe the announced enhancements, the planned offerings, and the long-term road map of the proposed product line.

**4.3 HIGHER EDUCATION CUSTOMER BASE**

**4.3.1 PRODUCT USE**

Provide examples where the proposed manufacturer's product is the primary UCaaS solution for higher education clients.

**4.3.2 PROPOSER'S EXPERIENCE**

Provide examples of Proposer's experience with the UCaaS solutions for higher education clients.

## **SECTION 5 -IMPLEMENTATION / TRAINING**

The University's goal is a smooth and seamless statewide implementation of the new telephone system using project controls, tools, and appropriate resources.

The Proposer should base their Statement of Work on the following assumptions.

- The University cabling infrastructure, premise wiring and data connectivity to required equipment is installed, tested and capable of supporting IP traffic prior to implementation.
- The University resources assigned to the implementation project are available to complete project tasks on a timely basis.

### **5.1 STATEMENT OF WORK (SOW)**

Proposer is responsible for and must include project controls and processes that will ensure a smooth implementation. Clearly outline the Proposer's methodology that supports implementation.

Except as otherwise specifically provided in the Statement of Work (SOW), Proposer will design, develop, and deliver a fully operable, comprehensive, integrated telephony solution which meets all of the requirements set forth in the RFP and this SOW, for the monthly service pricing set forth in the Contract Documents, and will demonstrate such solution for acceptance by the University as more fully set forth in this SOW. Costs associated must include all supervision, labor, materials, equipment, and testing instrumentation required for the work associated with the implementation project, as well as any overtime that may occur.

### **5.2 SOW TEMPLATE**

The SOW is attached as a template for responding Proposers to create a proposed SOW for this implementation project. It is intended to demonstrate the minimum requirements and the preferred level of project detail to be included in the submission.

Use this template to write an SOW appropriate for this project and provide applicable pricing. The Proposer should customize this template as necessary to ensure it is a suitable SOW for the delivery of their services. The Proposer's SOW response, including any modifications agreed to by the parties, will become the core element of any subsequent contract.

### **5.3 PROJECT MANAGEMENT**

Proposer is responsible for comprehensive project management services that include the ability to define and offer what are considered industry best practices for the implementation of a hosted solution of this scope, and address the expectations of both the Proposer and the University, including but not limited to the following:

Project Management Approach - Proposer must address the following:

- A. Risk management
- B. Issues management
- C. Financial management
- D. Change control

#### **5.3.1 DETAILED PROJECT PLAN/SCHEDULE**

Proposer Project Manager will be expected to provide a detailed Project Plan/Schedule, subject to approval by the University, which documents all activities and timelines associated with the project including, but not limited to:

- 5.3.1.1 Dates and responsibilities for the coordination tasks relative to pre-installation, installation, and post-installation.
- 5.3.1.2 Detailing and documenting of University requirements.
- 5.3.1.3 Services ordered, including any required onsite equipment.
- 5.3.1.4 Equipment received.
- 5.3.1.5 Network readiness assessment (if required).
- 5.3.1.6 Network and services coordination.
- 5.3.1.7 Solution design and configuration.
- 5.3.1.8 On-site training – timelines for system administration and end user training.
- 5.3.1.9 On-site installation of any required equipment.
- 5.3.1.10 Testing and acceptance.
- 5.3.1.11 On-site and remote post implementation support.

## 5.4 PRE-IMPLEMENTATION COORDINATION

### 5.4.1 PROPOSER RESPONSIBILITIES - PRE-INSTALLATION

#### 5.4.1.1 End User and Technical Detailed Requirements/Design

- A. Proposer and the University Project Manager will conduct meetings with departmental representatives and University technical teams as needed.
- B. Proposer will identify and document detailed University requirements as determined.
- C. Proposer will provide design and implementation plans for University approval.

#### 5.4.1.2 Services Pilot

- A. Proposer will work with the University Project Manager to ensure provider services are in place, tested, and available to a designated pilot group prior to implementation.

## 5.5 IMPLEMENTATION COORDINATION

### 5.5.1 PROPOSER SHALL BE RESPONSIBLE FOR THE FOLLOWING

- 5.5.1.1 Proposer shall work with the University Project Manager to determine site installation of any required equipment, deployment schedule, cutover plan, and coordination of any required equipment delivery. Cutover work will need to be carefully scheduled and performed with minimal disruption to the University operations.
- 5.5.1.2 The Proposer shall assume all responsibility for delivery, installation, and testing of all required equipment and services.
- 5.5.1.3 Proposer shall test and verify call handling patterns including announcements and prompts for any auto attendant functionality.
- 5.5.1.4 Proposer shall test and verify Disaster Recovery (DR) failover and recovery.
- 5.5.1.5 Proposer shall test and verify trunking, standard and alternate call routing and inbound and outbound dial plan.
- 5.5.1.6 Proposer shall provide cutover coordination.
- 5.5.1.7 Proposer shall provide onsite technical assistance during cutover events throughout the migration schedule.
- 5.5.1.8 Proposer Project Manager shall work with the University Project Manager to determine timeline and schedule for migration to new system.

## 5.6 POST IMPLEMENTATION

### 5.6.1 PROPOSER REQUIREMENTS INCLUDE THE FOLLOWING

- 5.6.1.1 Proposer shall supply adequate resources for all post-cutover issues including training, knowledge transfer, troubleshooting, and user programming adjustments.
- 5.6.1.2 Proposer shall supply a Test and Acceptance document for review and approval by the University.
- 5.6.1.3 Proposer shall work with the University resources to conduct and document test acceptance and site sign off.

## 5.7 DELIVERABLES

Proposer shall complete and present to UI the following deliverables:

- A. Implementation Statement of Work (SOW)
- B. Implementation Budget
- C. Implementation Schedule/Plan
- D. Detailed User and Technical Requirements
- E. Technical Design Documentation
- F. Equipment Lists and Locations
- G. Implementation Change Management Plan

- H. Issue Tracking and Resolution Plan
- I. Test and Acceptance Form

## 5.8 DOCUMENTATION

Proposer shall provide the following:

- A. Documentation compiled during the course of the project.
- B. Final as-built documentation, including detailed University-specific system configuration settings, end user and administrator profiles, etc.
- C. Description of the ongoing support resources available to the University post installation. For example: knowledge base, website, trouble tickets, user guides, web based training, etc.

## 5.9 RESOURCES & RESPONSIBILITIES

### 5.9.1 PROPOSER PROJECT MANAGER

- A. Proposer will provide a Project Manager experienced with the proposed solution to serve as the University's single point of contact in all aspects of this engagement including but not limited to scheduling, defining requirements, change control, risk mitigation, escalation, implementation planning, and acceptance.
- B. Proposer will provide a Project Manager who shall work in accordance with, and under the direction of, the University Project Manager to verify design specifications and end user requirements.
- C. Participate in planning meetings, weekly status meetings, weekly conference calls and e-mail communications with the University to discuss the project and coordinate activities.
- D. Maintain the Project Plan/Schedule, track dependencies between Proposer and the University tasks, identify and manage Proposer initiated project risks, and alert both project teams of any timeline slips and their effect on the project's target end date.
- E. Work in partnership with the University's Project Manager to coordinate Proposer tasks with the University's tasks throughout all phases of the project.
- F. Provide on-site project management, technical and user support during cut-over, to include up to 3 days of post-live assistance and project. The Proposer Project Manager will use an organized incident management process to track, document and resolve all identified issues.

### 5.9.2 PROPOSER INTEGRATION RESOURCE

Proposer will provide a resource for integration purposes and any custom configuration that may be required to meet specific needs of the University, including integration with the existing telephony system(s) during all phases of the implementation.

### 5.9.3 PROPOSER TRAINER(S)

Proposer will provide one or more trainers in order to complete the training requirements described in the Training section below.

### 5.9.4 PROPOSER PROJECT ENGINEER

Proposer will provide a Project Engineer to be the primary technical resource for delivery of the services proposed herein.

Where multiple platforms or applications are used, the Project Engineer must be fully versed in those components or additional qualified engineers must be available to the project team as required to support the complete solution.

### 5.9.5 UNIVERSITY PROJECT MANAGER

- A. The University Project Manager will provide overall project direction.
- B. The University will provide an internal Project Manager or designate a Project Manager to represent the University, to work closely with the Proposer project team. The University Project Manager's responsibilities will be to facilitate all communication and meetings between Proposer Project Manager and the University project team, and to ensure that the University is meeting the deadlines for accomplishing any University tasks set forth in the project schedule.
- C. Participate in planning meetings, weekly status meetings, weekly conference calls and e-mail communications with the Proposer to discuss the project and coordinate activities.
- D. Identify the University initiated project risks and manage resolution.
- E. Monitor project budgets, approve billings.
- F. Manage project issues and change control.

**5.9.6 UNIVERSITY SUPPORT RESOURCE(S)**

- A. University will provide one or more support resources to participate in training that will prepare them to become onsite support resources (including billing, reporting, etc.)
- B. University Trainer(s)
  - i. University will provide one or more resources to participate in train-the-trainer training session(s) provided by the Proposer to become University onsite user trainers.
- C. University Technical Resource(s)
  - i. The University will provide one or more technical resources to work with the design team with design specifications, data gathering, and compilation of end-user configuration data, required network configuration, and other defined technical requirements.

**5.10 TRAINING**

The University aims to provide a process through which employees acquire the capabilities to understand and smoothly transition to the new system allowing them to effectively perform their jobs with minimal interruption.

Proposer will establish a process to train and deliver training to University users, trainers, and support staff.

**5.10.1 PROPOSER EXPECTATIONS**

- A. Provide end user, train-the-trainer, and support training at each of the University sites or at agreed-upon regional locations.
- B. Work with the University Project Manager to determine training curriculum and schedule.
- C. Provide users with Quick Reference Guides and access to online resources.
- D. Make available any other training tools deemed advantageous to the ongoing use, training, and support of the proposed systems, including but not limited to access to online resources and continuing education.

Provide information for the following:

- 1. Describe the knowledge and skills necessary, which cannot be gained from Proposer training, for UI staff to become proficient in onsite support tasks. For example, connectivity, networking, telephony, user configuration, etc.
- 2. Describe how you plan to perform knowledge transfer and specialized training on all elements of the proposed solution to the University's implementation and support teams.
- 3. Describe your process for training onsite University trainers of the system.

**SECTION 6 -SOLUTION PRICING**

The University goal is to create a simplified internal billing process. UI would like the service you provide to us, and the service we provide to our customers, to be priced as simply and consistently as possible. We are interested in “bundles” that contain a comprehensive set of service features, including a handset, for a fixed price. We realize that some ala carte pricing for end users may be necessary but want to keep these exceptions to a minimum.

The preferred solution will include user-focused (e.g. - \$X per user) bundles that are provided at an affordable cost with handsets and as many features included as possible. **Please list any additional pricing discounts for an initial contract term of four-years and/or five-years, if applicable.**

- Proposer should provide a response that includes bundled pricing for a basic and an enhanced tier of service. Use your experience from prior customer engagements to suggest bundles that you feel will work best for our environment.
- To make it easier for UI to evaluate multiple RFP responses and to keep the invoice provided to UI by the selected Proposer as simple as possible, your bundle pricing should include as many costs as possible: system and user features, onsite equipment such as gateways and call processors, handsets, support, maintenance, troubleshooting/repair, MACDs, toll-free calling, onsite replacement/expansion IP handset stock, licensing, taxes, fees, administration fees, etc.
- We expect pricing to be equivalent for all in-scope UI locations.

Provide information for the following:

1. Describe services, features, and handsets you provide in each bundle.
2. Describe available services not included in a bundle. For example, toll calls, audio conferencing, call center functionality, voice to text, Gigabit-capable handsets, network-based fax license, etc.
3. Describe any price point breaks, minimal commitments, and limitations/conditions to the proposed pricing model.

**6.1 CONFIGURATION SIZING**

Use the information in the following charts as the basis for your pricing.

**6.1.1 INITIAL QUANTITY TABLE 1 – MOSCOW ESTIMATES**

Main Campus – Moscow, Idaho (3,100 lines)	Quantity	Notes
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	300	Could be lower if a network-based fax solution is available and implemented. Includes 100 speakerphones.
Basic bundle	2,300	
Enhanced bundle	500	
Operator / receptionist	1	
Network fax users	200	
Corded/cordless headsets	350	
Speaker phones (IP-based)	3	For testing only
Mobile / remote user	10	For testing only
Softphone client	5	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	5	This is not in scope, but desired for assessment purposes.

## 6.1.2 INITIAL QUANTITY TABLE 2 – BOISE ESTIMATES

<b>Boise, Idaho (160 lines)</b>	<b>Quantity</b>	<b>Notes</b>
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	16	Could be lower if a network-based fax solution is available and implemented. Includes 8 speakerphones.
Basic bundle	124	
Enhanced bundle	20	
Operator / receptionist	0	
Network fax users	25	
Corded/cordless headsets	30	
Speaker phones (IP-based)	0	
Mobile / remote user	0	
Softphone client	0	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	0	This is not in scope, but desired for assessment purposes.

## 6.1.3 INITIAL QUANTITY TABLE 3 – COEUR D'ALENE ESTIMATES

<b>Coeur d'Alene, Idaho</b>	<b>Quantity</b>	<b>Notes</b>
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	6	Could be lower if a network-based fax solution is available and implemented. Includes 3 speakerphones.
Basic bundle	50	
Enhanced bundle	10	
Operator / receptionist	0	
Network fax users	5	
Corded/cordless headsets	10	
Speaker phones (IP-based)	0	
Mobile / remote user	0	
Softphone client	0	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	0	This is not in scope, but desired for assessment purposes.

## 6.1.4 INITIAL QUANTITY TABLE 4 – IDAHO FALLS ESTIMATES

<b>Idaho Falls, Idaho</b>	<b>Quantity</b>	<b>Notes</b>
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	9	Could be lower if a network-based fax solution is available and implemented. Includes 4 speakerphones.
Basic bundle	40	
Enhanced bundle	7	
Operator / receptionist	0	
Network fax users	5	
Corded/cordless headsets	10	
Speaker phones (IP-based)	0	
Mobile / remote user	0	
Softphone client	0	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	0	This is not in scope, but desired for assessment purposes.

#### 6.1.5 INITIAL QUANTITY TABLE 4 – POST FALLS ESTIMATES

<b>Post Falls, Idaho</b>	<b>Quantity</b>	<b>Notes</b>
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	2	Could be lower if a network-based fax solution is available and implemented. Includes 100 speakerphones.
Basic bundle	6	
Enhanced bundle	0	
Operator / receptionist	0	
Network fax users	1	
Corded/cordless headsets	2	
Speaker phones (IP-based)	0	
Mobile / remote user	0	
Softphone client	0	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	0	This is not in scope, but desired for assessment purposes.

**6.2 PRICING**

Use the following charts as formatted to provide pricing quotes. All services proposed shall clearly identify both monthly recurring charges and any one-time installation or non-recurring charges, as outlined in the pricing tables herein.

**6.2.1 PRICING TABLE 1 – ONE-TIME IMPLEMENTATION CHARGES**

List all one-time charges associated with implementation of your solution. Mark “N/A” or “Waived” where appropriate. If there are multiple items for a charge below, list and define each item and its cost separately. List quantities, unit costs, and extended costs. Include, for example, implementation, project management, training, software licensing, equipment, travel, etc.

<b>ONE-TIME CHARGES – Relative to Implementation</b>	<b>QTY</b>	<b>UNIT COST</b>	<b>PER UNIT TYPE (EACH, HOUR, SESSION, YEAR, ETC)</b>	<b>TOTAL COST</b>
(insert as many lines as are necessary)				
<b>TOTAL</b>				

**6.2.2 PRICING TABLE 2 - RECURRING CHARGES (MONTHLY SERVICE FEES)**

Use the table below to list all recurring monthly charges. List and define each item with a cost separately, including bundles, non-bundled services, any special fees, estimated taxes<sup>1</sup>, surcharges, or regulatory fees. Table below includes examples.

**Note:** All charges not listed separately will be assumed to be included in the cost of the bundled service offering.

<b>RECURRING CHARGES: MONTHLY SERVICE FEES</b>	<b>QTY</b>	<b>UNIT COST</b>	<b>PER UNIT TYPE (EACH, HOUR, SESSION, YEAR, ETC)</b>	<b>TOTAL COST</b>
Basic Bundle				
Enhanced Bundle				
Audio Conferencing				
Network Fax				
Voice to Text				
Other ( <i>specify</i> ):				
<b>TOTAL</b>				

<sup>1</sup> The University of Idaho is exempt from Idaho sales taxes and federal excise taxes. Do not include amounts for Idaho sales tax or federal excise tax.

**6.2.3 PRICING TABLE 3 – USAGE BASED CHARGES**

List all usage based charges, along with rates and units. List and define each item with a cost separately. If an item charge is not listed below, it will be assumed that the charge is included in the bundled services amount.

USAGE BASED CHARGES	UNIT COST	PER UNIT TYPE (EACH, HOUR, SESSION, YEAR, ETC)
Moves, Adds, Changes, Deletes		
Toll Call Costs (do not include international rates)		
Other ( <i>specify</i> ):		

**6.2.4 ADDITIONAL PRICING**

Provide additional information on the following options:

1. volume pricing on conferencing speaker phones, headsets, and accessories
2. special offers, financing, promotions, or discounts for trading-in any legacy equipment
3. minimums, volume or threshold levels required for additional price discounts

## **SECTION 7 - PROCUREMENT PROCESS**

### **7.1 PROPOSER LIST AND QUALIFICATION EVALUATION**

After the established date for receipt of proposals, a listing of Proposers submitting proposals will be prepared, and will be available for public inspection.

Qualifications and proposals submitted by interested Proposers will be reviewed and evaluated based on the evaluation factors set forth in the RFP.

### **7.2 PROPOSAL CLASSIFICATION**

For the purpose of conducting discussions with individual proposers, if required, proposals will initially be classified as:

- A. Potentially Acceptable
- B. Unacceptable

Discussions may be conducted with any or all of the Proposers whose proposals are found acceptable or potentially acceptable. Proposers whose proposals are unacceptable will be notified promptly. The Director of Purchasing will establish procedures and schedules for conducting oral and/or written discussions.

Proposers are advised that the University may award an Agreement on the basis of initial offers received, without discussions; therefore, each initial offer should contain the Proposer's best terms from a cost and technical standpoint.

### **7.3 PROPOSER INVESTIGATION**

The University will make such investigations as it considers necessary to obtain full information on the Proposers selected for discussions, and each Proposer shall cooperate fully in such investigations.

### **7.4 FINAL OFFERS AND AWARD OF AGREEMENT**

Following any discussions with Proposers regarding their technical proposals, alternative approaches, or optional features, a number of the firms may be requested to submit best and final offers. The committee will rank the final Proposers for the project, giving due consideration to the established evaluation criteria. The committee will propose award to the proposal which is found to be most advantageous to the University, based on the factors set forth in the Request for Proposals.

## **SECTION 8 - EVALUATION PROCESS**

### **8.1 GENERAL**

Proposals will be evaluated on how well the proposal meets the needs of the University, as described in the proposer's response to each requirement and the evaluation criteria identified in this RFP. The selected Proposer(s) may or may not be the Proposer(s) proposing the services having the lowest bid price. Proposals will be evaluated on the basis of the criteria specified below.

### **8.2 EVALUATION CRITERIA**

Proposals will be evaluated using the following criteria (not in priority order):

- A. The proposed solution's fit to the University's requirements.
- B. References, experience and expertise.
- C. The total costs of the solution.
- D. The quality of the proposed work plan.
- E. Additional items, including agreement with contract terms.

The University may, during the evaluation process, request from any Proposer additional information which the University deems necessary to determine the Proposer's ability to perform the required services.

### **8.3 EVALUATION PROCESS**

The evaluation of proposals will be undertaken in three stages.

Stage 1: Proposals will be reviewed for completeness and conformity to all University requirements. Proposals not substantially in compliance with such requirements will be identified and, at the sole discretion of the University, may be eliminated from further consideration.

Stage 2: Proposals will be evaluated in detail and preliminarily ranked based on the criteria listed above in this section. Proposals from Proposers determined not to be responsive or qualified will be identified and, at the sole discretion of the University, may be eliminated from further consideration. The evaluators may find it necessary to request additional information from the Proposers. All requests and responses shall be in writing. The University will release a list of all selected finalist Proposers.

Stage 3: The University may require that one or more selected Proposers conduct a presentation and product demonstration for representatives of the University for further evaluation. The University expects each proposer to demonstrate the latest generally available versions of the systems and software that comprise the proposed solution. If, however, a proposer is proposing to install a later (pre-announced) release or an older (previous release) version, this must be clearly communicated and explained in the proposal.

## **SECTION 9 - GENERAL CONTRACTUAL TERMS AND CONDITIONS**

### **9.1 AGREEMENT TERMS AND CONDITIONS**

The submission of a proposal herein constitutes the agreement of any Proposer that any Agreement to be drawn as the result of an award herein shall be prepared by the University and shall include at a minimum, all terms and conditions set forth in this RFP. The submission of a proposal shall further constitute the agreement of each Proposer that it will not insist on the use of standard contract agreements, documents, or forms, and that it waives any demand for the use of its standard agreements. The Agreement between the parties shall consist of, in order of precedence: the agreement document signed by the Parties subsequent to submission of the proposal, and any attachments thereto and incorporations therein, the terms and conditions in the RFP, and the Proposer's response to the RFP.

### **9.2 ASSIGNMENT**

No assignment of this Agreement or of any right accruing under this Agreement shall be made, in part or in whole, by Contractor without the written consent of the University. Notwithstanding any assignment, Contractor shall remain fully liable on this Agreement and shall not be released from performing any of the terms, covenants, and conditions of this Agreement.

### **9.3 TERMINATION FOR CONVENIENCE**

The University may terminate this Agreement, in whole or in part, at any time by written notice to the Contractor. The Contractor shall be paid its reasonable costs, including reasonable close-out costs and a reasonable profit on work performed up to the time of termination. The Contractor shall promptly submit its termination claim for payment. If the Contractor has any property in its possession belonging to the University, the Contractor will account for the same and dispose of it in the manner the University directs.

### **9.4 TERMINATION FOR DEFAULT**

If the Contractor does not deliver the materials in accordance with the Contract delivery schedule, or if the Contract is for services and the Contractor fails to perform in the manner called for in the Contract, or if the Contractor fails to comply with any other provisions of the Contract, the University may terminate this Contract for default. Termination shall be effected by serving on the Contractor a notice of termination setting forth the manner in which the Contractor is in default. The Contractor will be paid a reasonable price for materials delivered and accepted, or services performed in accordance with the manner of performance set forth in the Contract.

### **9.5 INDEMNIFICATION**

Contractor shall indemnify, defend and hold the University and the State of Idaho harmless from and against any and all claims, losses, damages, injuries, liabilities and all costs, including attorney's fees, court costs and expenses and liabilities incurred in or from any such claim, arising from any breach or default in the performance of any obligation on Contractor's part to be performed under the terms of this Agreement, or arising from any act, negligence or the failure to act of Contractor, or any of its agents, subcontractors, employees, invitees or guests. Contractor, upon notice from the University, shall defend the University at Contractor's expense by counsel reasonably satisfactory to the University. Contractor, as a material part of the consideration of the University, hereby waives all claims in respect thereof against the University.

Contractor shall: (a) notify the University in writing as soon as practicable after notice of an injury or a claim is received; (b) cooperate completely with the University and/or the University's insurers in the defense of such injury or claim; and (c) take no steps such as admission of liability which would prejudice the defense or otherwise prevent the University from protecting the University's interests.

### **9.6 APPLICABLE LAW AND FORUM**

This Agreement shall be construed in accordance with, and governed by the laws of the State of Idaho. Any legal proceeding related to this Agreement shall be instituted in the courts of the county of Latah, state of Idaho, and Contractor agrees to submit to the jurisdiction of such courts.

### **9.7 LAWS, REGULATIONS AND PERMITS**

The Contractor shall give all notices required by law and comply with all applicable Federal, State, and local laws, ordinances, rules and regulations relating to the conduct of the work. The Contractor shall be liable for all violations of the law in connection with work furnished by the Contractor, including the Contractor's subcontractors.

### **9.8 GENERAL QUALITY CONSENT - BAHR - SECTION II**

All of the Contractor's work shall be performed with the highest degree of skill and completed in accordance with the Agreement Documents.

### **9.9 PROOF OF COMPLIANCE WITH AGREEMENT**

In order that the University may determine whether the Contractor has complied with the requirements of the Agreement Documents, the Contractor shall, at any time when requested, submit to the University properly authenticated documents or other satisfactory proofs as to compliance with such requirements.

### **9.10 PAYMENT AND ACCEPTANCE**

Except as otherwise provided herein, payments shall be due and payable within (30) days after acceptance of such goods or services or after receipt of properly completed invoice, whichever is later. No advance payment shall be made for goods or services furnished pursuant to this Agreement.

### **9.11 CONTINUATION DURING DISPUTES**

The Contractor agrees that notwithstanding the existence of any dispute between the parties, insofar as possible under the terms of the Agreement to be entered into, each party will continue to perform the obligations required of it during the continuation of any such dispute, unless enjoined or prohibited by any court.

### **9.12 SEVERABILITY**

If any term or condition of this Agreement or the application thereof to any person(s) or circumstances is held invalid, such invalidity shall not affect other terms, conditions or applications which can be given effect without the invalid term, condition or application; to this end the terms and conditions of this Agreement are declared severable.

### **9.13 INTEGRATION**

This Agreement constitutes the entire Agreement between the parties. No change thereto shall be valid unless in writing communicated in the stipulated manner, and signed by the University and the Contractor.

### **9.14 BINDING EFFECT**

This Agreement is for the benefit only of the parties hereto and shall inure to the benefit of and bind the parties hereto and their respective heirs, legal representatives, successors, and assigns.

### **9.15 APPROPRIATIONS CLAUSE**

If the term of this Agreement is longer than one year, the University's obligations and liabilities hereunder are subject to the appropriation of funds from the State of Idaho, which appropriation shall be in the State of Idaho's sole discretion, from revenues legally available to the University for the ensuing fiscal year for the purposes of this Agreement. If the State of Idaho does not appropriate the funds for the purpose of this Agreement, the Agreement shall terminate and neither party shall have any further obligations hereunder.

### **9.16 IRS SECTION 501(C)(3) AND SECTION 115 CONSIDERATIONS**

If any provision of this Agreement may cause the University to lose its status as an Internal Revenue Code Section 501(c)(3) corporation, this Agreement shall be voidable. In the alternative, at the sole option of the University, the offending provision(s) shall be modifiable such that the provision(s) will no longer cause the University to lose its status as a 501(c)(3) corporation. The terms of the modification shall be subject to agreement in writing by all parties.

### **9.17 COMPLIANCE WITH GOVERNOR'S EXECUTIVE ORDER**

In the event any provision of this Agreement shall cause the University to be in violation of any of the Governor of Idaho's Executive Orders, then this Agreement shall be voidable at the sole option of the University.

### **9.18 DEBARRED, SUSPENDED OR EXCLUDED**

All purchase orders and contracts issued by the University of Idaho are subject to F.A.R. 52.209-6. Supplier warrants that neither supplier nor its principals is presently debarred, suspended or proposed for debarment by the Federal Government.

### **9.19 NON-USE OF NAMES AND TRADEMARKS**

Contractor shall not use the name, trade name, trademark, or other designation of the University, or any contraction, abbreviation, or simulation any of the foregoing, in any advertisement or for any commercial or promotional purpose (other than in performing under this Agreement) without the University's prior written consent in each case.

**9.20 RISK OF LOSS**

Until all improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, Contractor shall bear all risks of all loss or damage to the improvements, equipment, or goods, excluding loss or damage caused by acts, omissions, or negligence of the University. Once all improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, the risk of all loss or damage shall be borne by University, excluding loss or damage caused by acts, omissions, or negligence of the Contractor.

**9.21 CONTRACTOR REPRESENTATIONS**

Contractor represents and warrants the following: (a) that it is financially solvent, able to pay its debts as they mature, and possessed of sufficient working capital to provide the equipment and goods, complete the services, and perform its obligations required hereunder; (b) that it is able to furnish any of the plant, tools, materials, supplies, equipment, and labor required to complete the services required hereunder and perform all of its obligations hereunder and has sufficient experience and competence to do so; (c) that it is authorized to do business in Idaho, properly licensed by all necessary governmental and public and quasi-public authorities having jurisdiction over it and the services, equipment, and goods required hereunder, and has or will obtain all licenses and permits required by law; and (d) that it has visited the site of the project and familiarized itself with the local conditions under which this Agreement is to be performed.

**9.22 REGENTS' APPROVAL**

This Agreement may be subject to approval by the Regents of the University of Idaho, and if it is and if such approval is not granted this Agreement shall be void and neither party shall have any further obligations or liabilities hereunder.

**9.23 SURVIVAL OF TERMS**

The terms and provisions hereof, and all documents being executed hereunder, if any, including, without limitation, the representations and warranties, shall survive this Agreement and shall remain in full force and effect thereafter.

**9.24 HEADINGS**

The headings contained in this Agreement are for reference purposes only and shall not in any way affect the meaning or interpretation hereof.

**9.25 ADDITIONAL ACTS**

Except as otherwise provided herein, in addition to the acts and deeds recited herein and contemplated to be performed, executed and/or delivered by the parties, the parties hereby agree to perform, execute and/or deliver or cause to be performed, executed and/or delivered any and all such further acts, deeds and assurances as any party hereto may reasonably require to consummate the transaction contemplated hereunder.

**9.26 TIME OF ESSENCE**

All times provided for in this Agreement, or in any other document executed hereunder, for the performance of any act will be strictly construed, time being of the essence.

**9.27 WAIVER**

No covenant, term or condition or the breach thereof shall be deemed waived, except by written consent of the party against whom the waiver is claimed, and any waiver of the breach of any covenant, term or condition shall not be deemed to be a waiver of any other covenant, term or condition herein. Acceptance by a party of any performance by another party after the time the same shall have become due shall not constitute a waiver by the first party of the breach or default of any such covenant, term or condition unless otherwise expressly agreed to by the first party in writing.

**9.28 FORCE MAJEURE**

Any prevention, delay or stoppage due to strikes, lockouts, labor disputes, acts of God, inability to obtain labor or materials or reasonable substitutes therefore, governmental restrictions, governmental regulations, governmental controls, enemy or hostile governmental action, civil commotion, fire or other casualty, and other causes beyond the reasonable control of the party obligated to perform (except for financial ability), shall excuse the performance, except for the payment of money, by such party for a period equal to any such prevention, delay or stoppage.

**9.29 NO JOINT VENTURE  
CONSENT - BAHR - SECTION II**

Nothing contained in this Agreement shall be construed as creating a joint venture, partnership, or agency relationship between the parties.

**9.30 INFORMATION TRUE AND CORRECT**

All documents, agreements and other information provided to the University by Contractor or which Contractor has caused to be provided to the University are true and correct in all respects and do not omit to state any material fact or condition required to be stated, necessary to make the statement or information not misleading, and there are no other agreements or conditions with respect thereto.

**9.31 EQUAL OPPORTUNITY**

Contractor represents and agrees that it will not discriminate in the performance of this Agreement or in any matter directly or indirectly related to this Agreement on the basis of race, sex, color, religion, national origin, disability, ancestry, or status as a Vietnam veteran. This non-discrimination requirement includes, but is not limited to, any matter directly or indirectly related to employment. Breach of this covenant may be regarded as a material breach of Agreement.

**9.32 PUBLIC RECORDS**

The University is a public agency. All documents in its possession are public records. Proposals are public records and will be available for inspection and copying by any person upon completion of the RFP process. If any Proposer claims any material to be exempt from disclosure under the Idaho Public Records Law, the Proposer will expressly agree to defend, indemnify and hold harmless the University from any claim or suit arising from the University's refusal to disclose any such material. No such claim of exemption will be valid or effective without such express agreement. The University will take reasonable efforts to protect any information marked "confidential" by the Proposer, to the extent permitted by the Idaho Public Records Law. Confidential information must be submitted in a separate envelope, sealed and marked "Confidential Information" and will be returned to the Proposer upon request after the award of the contract. It is understood, however, that the University will have no liability for disclosure of such information. Any proprietary or otherwise sensitive information contained in or with any Proposal is subject to potential disclosure.

**9.33 UNIVERSITY'S RULES, REGULATIONS, AND INSTRUCTIONS**

Contractor will follow and comply with all rules and regulations of the University and the reasonable instructions of University personnel. The University reserves the right to require the removal of any worker it deems unsatisfactory for any reason.

## **SECTION 10 - INDEMNITY, RISKS OF LOSS, INSURANCE**

### **10.1 RISK OF LOSS**

Until all improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, Contractor and its subcontractors of any tier shall bear all risks of all loss or damage to the improvements, equipment, or goods, excluding loss or damage caused by acts, omissions, or negligence of the University. Once all improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, the risk of all loss or damage shall be borne by University, excluding loss or damage caused by acts, omissions, or negligence of the Contractor. Contractors shall require its subcontractors of any tier to bear the same risk of loss.

### **10.2 INDEMNIFICATION**

Contractor shall indemnify, defend and hold the University and the State of Idaho harmless from and against any and all claims, losses, damages, injuries, liabilities and all costs, including attorney's fees, court costs and expenses and liabilities incurred in or from any such claim, arising from any breach or default in the performance of any obligation on Contractor's part to be performed under the terms of this Agreement, or arising from any act, negligence or the failure to act of Contractor, or any of its agents, subcontractors, employees, invitees or guests. Contractor, upon notice from the University, shall defend the University at Contractor's expense by counsel reasonably satisfactory to the University. Contractor, as a material part of the consideration of the University, hereby waives all claims in respect thereof against the University.

Contractor shall: (a) notify the University in writing as soon as practicable after notice of an injury or a claim is received; (b) cooperate completely with the University and/or the University's insurers in the defense of such injury or claim; and (c) take no steps such as admission of liability which would prejudice the defense or otherwise prevent the University from protecting the University's interests.

### **10.3 INSURANCE**

#### **10.3.1 GENERAL REQUIREMENTS**

- 10.3.1.1 Contractor and its subcontractor(s) of any tier are required to carry the types and limits of insurance shown in this insurance clause, section 8.0, and to provide University with a Certificate of Insurance ("certificate"). All certificates shall be coordinated by the Contractor and provided to the University within seven (7) days of the signing of the contract by the Contractor. Certificates shall be executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below. All certificates shall provide for thirty (30) days' written notice to University prior to cancellation, non-renewal, or other material change of any insurance referred to therein as evidenced by return receipt of United States certified mail. Said certificates shall evidence compliance with all provisions of this section 8.0. Exhibit A of this Agreement contains a Request for Certificate of Insurance which shall be given to the insurance broker or agent of the Contractor and its subcontractor(s) of any tier, upon award of bid to Contractor.
- 10.3.1.2 Additionally and at its option, Institution may request certified copies of required policies and endorsements. Such copies shall be provided within (10) ten days of the Institution's request.
- 10.3.1.3 All insurance required hereunder shall be maintained in full force and effect with insurers with Best's rating of AV or better and be licensed and admitted in Idaho. All policies required shall be written as primary policies and not contributing to nor in excess of any coverage University may choose to maintain. Failure to maintain the required insurance may result in termination of this Agreement at University's option.
- 10.3.1.4 All policies except Workers Compensation and Professional Liability shall name University as Additional Insured. The Additional Insured shall be stated as: "State of Idaho and The Regents of the University of Idaho". Certificate Holder shall read: "University of Idaho." Certificates shall be mailed to: University of Idaho, Risk Management, P.O. Box 443162, Moscow, ID 83844-3162.
- 10.3.1.5 Failure of University to demand such certificate or other evidence of full compliance with these insurance requirements or failure of Institution to identify a deficiency from evidence that is provided shall not be construed as a waiver of the obligation of Contractor and its subcontractor(s) of any tier to maintain such insurance.

- 10.3.1.6 No Representation of Coverage Adequacy. By requiring insurance herein, University does not represent that coverage and limits will necessarily be adequate to protect Contractor and its subcontractor(s) of any tier, and such coverage and limits shall not be deemed as a limitation on the liability of the Contractor and its subcontractor(s) of any tier under the indemnities granted to University in this Agreement.
- 10.3.1.7 Contractor is responsible for coordinating the reporting of claims and for the following: (a) notifying the Institution in writing as soon as practicable after notice of an injury or a claim is received; (b) cooperating completely with University in the defense of such injury or claim; and (c) taking no steps (such as admission of liability) which will prejudice the defense or otherwise prevent the University from protecting its interests.

**10.3.2 REQUIRED INSURANCE COVERAGE.**

- 10.3.2.1 Contractor and its subcontractor(s) of any tier shall at its own expense obtain and maintain:
  - A. Commercial General and Umbrella / Excess Liability Insurance. Contractor and its subcontractor(s) of any tier shall maintain Commercial General Liability ("CGL") written on an occurrence basis and with a limit of not less than \$1,000,000 each occurrence and in the aggregate. If such CGL insurance contains a general aggregate limit, it shall apply separately by location and shall not be less than \$1,000,000. CGL insurance shall be written on standard ISO occurrence form (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury, and liability assumed under a contract including the tort liability of another assumed in a business contract. Waiver of subrogation language shall be included. If necessary to provide the required limits, the Commercial General Liability policy's limits may be layered with a Commercial Umbrella or Excess Liability policy.
  - B. Commercial Auto Insurance. Contractor and its subcontractor(s) of any tier shall maintain a Commercial Auto policy with a Combined Single Limit of not less than \$1,000,000; Underinsured and Uninsured Motorists limit of not less than \$1,000,000; Comprehensive; Collision; and a Medical Payments limit of not less than \$10,000. Coverage shall include Non-Owned and Hired Car coverage. Waiver of subrogation language shall be included.
  - C. Business Personal Property Insurance. Contractor and its subcontractor(s) of any tier shall purchase insurance to cover Business Personal Property of Contractor and its subcontractor(s) of any tier. In no event shall University be liable for any damage to or loss of personal property sustained by Contractor, even if such loss is caused by the negligence of Institution, its employees, officers or agents. Waiver of subrogation language shall be included.
  - D. Workers' Compensation Coverage. Contractor and its subcontractor(s) of any tier shall maintain all coverage statutorily required of the Contractor and its subcontractor(s) of any tier, and coverage shall be in accordance with the laws of Idaho. Contractor and its subcontractor(s) of any tier shall maintain Employer's Liability with limits of not less than \$100,000 / \$500,000 / \$100,000.
  - E. Professional Liability. If professional services are supplied to Institution, Contractor and its subcontractor(s) of any tier, Contractor and its subcontractor(s) of any tier shall maintain Professional Liability (Errors & Omissions) insurance on a claims made basis, covering claims made during the policy period and reported within three years of the date of occurrence. Limits of liability shall be not less than one million dollars (\$1,000,000).

## UNIVERSITY OF IDAHO

**SECTION 11 - UNIVERSITY OF IDAHO - GENERAL TERMS AND CONDITIONS**

THIS ORDER EXPRESSLY LIMITS ACCEPTANCE TO THE TERMS AND CONDITIONS STATED HEREIN. ALL ADDITIONAL OR DIFFERENT TERMS PROPOSED BY CONTRACTOR ARE OBJECTED TO AND ARE HEREBY REJECTED, UNLESS OTHERWISE PROVIDED FOR IN WRITING BY THE PURCHASING MANAGER, UNIVERSITY OF IDAHO.

**11.1 CHANGES**

No alteration in any of the terms, conditions, delivery, price, quality, quantity or specifications of this order will be effective without the written consent of the University of Idaho Department of Purchasing Services.

**11.2 PACKING**

No charges will be allowed for special handling, packing, wrapping, bags, containers, etc., unless otherwise specified.

**11.3 DELIVERY**

For any exceptions to the delivery date as specified on the order, Contractor shall give prior notification and obtain approval thereto from the University of Idaho, Department of Purchasing Services. With respect to delivery under this order, time is of the essence and order is subject to termination for failure to deliver within the timeframe specified in this order.

**11.4 SHIPPING INSTRUCTIONS**

Unless otherwise instructed, all goods are to be shipped prepaid and allowed, FOB Destination.

**11.5 ORDER NUMBERS**

Agreement order numbers or purchase order numbers shall be clearly shown on all acknowledgments, shipping labels, packing slips, invoices, and on all correspondence.

**11.6 REJECTION**

All goods, materials, or services purchased herein are subject to approval by the University of Idaho. Any rejection of goods, materials, or services resulting from nonconformity to the terms, conditions or specifications of this order, whether the goods are held by the University of Idaho or returned, will be at Contractor's risk and expense.

**11.7 QUALITY STANDARDS**

Brand names, models, and specifications referenced herein are meant to establish a minimum standard of quality, performance, or use required by the University. No substitutions will be permitted without written authorization of the University of Idaho Department of Purchasing Services.

**11.8 WARRANTIES**

Contractor warrants that all products delivered under this order shall be new, unless otherwise specified, free from defects in material and workmanship, and shall be fit for the intended purpose. All products found defective shall be replaced by the Contractor upon notification by the University of Idaho. All costs of replacement, including shipping charges, are to be borne by the Contractor.

**11.9 PAYMENT, CASH DISCOUNT**

Invoices will not be processed for payment nor will the period of computation for cash discount commence until receipt of a properly completed invoice or invoiced items are received and accepted, whichever is later. If an adjustment in payment is necessary due to damage or dispute, the cash discount period shall commence on the date final approval for payment is authorized. Payment shall not be considered late if a check or warrant is available or mailed within the time specified.

**11.10 LIENS, CLAIMS AND ENCUMBRANCES**

Contractor warrants and represents that all the goods and materials delivered herein are free and clear of all liens, claims or encumbrances of any kind.

**11.11 TERMINATION**

In the event of a breach by Contractor of any of the provisions of this Agreement, the University of Idaho reserves the right to cancel and terminate this Agreement forthwith upon giving written notice to the Contractor. Contractor shall be liable for damages suffered by the University of Idaho resulting from Contractor's breach of Agreement.

### **11.12 TRADEMARKS**

Contractor shall not use the name, trade name, trademark, or any other designation of the University, or any contraction, abbreviation, adaptation, or simulation of any of the foregoing, in any advertisement or for any commercial or promotional purpose (other than in performing under this Agreement) without the University's prior written consent in each case.

### **11.13 OSHA REGULATIONS**

Contractor guarantees all items, or services, meet or exceed those requirements and guidelines established by the Occupational Safety and Health Act.

### **11.14 TAXES**

The University of Idaho is exempt from payment of Idaho State Sales and Use Tax. In addition, the University is generally exempt from payment of Federal Excise Tax under a permanent authority from the District Director of the Internal Revenue Service. Exemption certificates will be furnished as required upon written request by Contractor. If Contractor is required to pay any taxes incurred as a result of doing business with the University of Idaho, it shall be solely responsible for the payment of those taxes. If Contractor is performing public works construction, it shall be responsible for payment of all sales and use taxes.

### **11.15 BINDING EFFECT**

This Agreement is for the benefit only of the parties hereto and shall inure to the benefit of and bind the parties and their respective heirs, legal representatives, successors and assigns.

### **11.16 ASSIGNMENTS**

No Agreement, order, or any interest therein shall be transferred by Contractor to any other party without the approval in writing of the Purchasing Manager, University of Idaho. Transfer of an Agreement without approval may cause the rescission of the transferred Agreement at the option of the University of Idaho.

### **11.17 WAIVER**

No covenant, term or condition, or the breach thereof, shall be deemed waived, except by written consent of the party against whom the waiver is claimed, and any waiver of the breach of any covenant, term, or condition herein. Acceptance by a party of any performance by another party after the time the same shall have become due shall not constitute a waiver by the first party of the breach or default unless otherwise expressly agreed to in writing.

### **11.18 FORCE MAJEURE**

Any prevention, delay or stoppage due to strikes, lockouts, labor disputes, acts of God, inability to obtain labor or materials or reasonable substitutes thereof, governmental restrictions, governmental regulations, governmental controls, enemy or hostile governmental action, civil commotion, fire or other casualty, and other causes beyond the reasonable control of the party obligated to perform (except for financial ability), shall excuse the performance by such party for a period equal to any such prevention, delay or stoppage.

### **11.19 NO JOINT VENTURE**

Nothing contained in this Agreement shall be construed as creating a joint venture, partnership, or employment or agency relationship between the parties.

### **11.20 PRICE WARRANTY FOR COMMERCIAL ITEMS**

Contractor warrants that prices charged to the University of Idaho are based on Contractor's current catalog or market prices of commercial items sold in substantial quantities to the general public and prices charged do not exceed those charged by Contractor to other customers purchasing the same item in like or comparable quantities.

### **11.21 NONDISCRIMINATION**

Contractor represents and agrees that it will not discriminate in the performance of this Agreement or in any matter directly or indirectly related to this Agreement on the basis of race, sex, color, religion, national origin, disability, ancestry, or status as a Vietnam veteran. This non-discrimination requirement includes, but is not limited to, any matter directly or indirectly related to employment. Breach of this covenant may be regarded as a material breach of Agreement.

**11.22 UNIVERSITY REGULATIONS**

Contractor shall follow and comply with all rules and regulations of the University and the reasonable instructions of University personnel.

**11.23 GOVERNING LAW**

This Agreement shall be construed in accordance with, and governed by the laws of the State of Idaho. Any legal proceeding related to this Agreement shall be instituted in the courts of the county of Latah, state of Idaho, and Contractor agrees to submit to the jurisdiction of such courts.

## UNIVERSITY OF IDAHO - REQUEST FOR PROPOSAL

**Exhibit A – Request for Certificate of Insurance from Contractor\***

\*If bid is awarded to Contractor

Page 1 of 2

Give this form to your insurance agent / broker

Agents/ Brokers: RETURN A COPY OF THESE INSTRUCTIONS WITH YOUR CERTIFICATE.

Certificates without a copy of these instructions will not be accepted.

Contractor and its subcontractors of any tier (“Insured”) are required to carry the types and limits of insurance shown in this Request, and to provide University of Idaho (“Certificate Holder”) with a Certificate of Insurance within seven (7) days of the signing of this Contract.

Certificate Holder shall read:

State of Idaho and the Regents of the University of Idaho  
 Attn: Risk Management  
 P.O. Box 443162  
 Moscow, ID 83844-3162

Description area of certificate shall read: Attn: Contract for Services

All certificates shall provide for thirty (30) days’ written notice to Certificate Holder prior to cancellation or material change of any insurance referred to in the certificate.

All insurers shall have a Best’s rating of AV or better and be licensed and admitted in Idaho.

All policies required shall be written as primary policies and not contributing to nor in excess of any coverage Certificate Holder may choose to maintain.

All policies (except Workers Compensation and Professional Liability) shall name the following as Additional Insured: The Regents of the University of Idaho, a public corporation, state educational institution, and a body politic and corporate organized and existing under the Constitution and laws of the state of Idaho.

Failure of Certificate Holder to demand a certificate or other evidence of full compliance with these insurance requirements or failure of Certificate Holder to identify a deficiency from evidence that is provided shall not be construed as a waiver of Insured’s obligation to maintain such insurance.

Failure to maintain the required insurance may result in termination of this grant or contract at the Certificate Holder’s option.

By requiring this insurance, Certificate Holder does not represent that coverage and limits will necessarily be adequate to protect Insured, and such coverage and limits shall not be deemed as a limitation on Insured’s liability under the terms of the grant or contract.

A copy of this certificate request must be sent with the Certificate.  
 UNIVERSITY OF IDAHO - REQUEST FOR PROPOSAL

**Exhibit A – Request for Certificate of Insurance from Contractor\***

\*If bid is awarded to Contractor

Page 2 of 2

Required Insurance Coverage. Insured shall obtain insurance of the types and in the amounts described below.

Commercial General and Umbrella Liability Insurance. Insured shall maintain commercial general liability (CGL) and, if necessary, commercial umbrella insurance with a limit of not less than \$1,000,000 each occurrence and in the aggregate. If such CGL insurance contains a general aggregate limit, it shall apply separately by location and shall not be less than \$1,000,000. CGL insurance shall be written on standard ISO occurrence form (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury, and liability assumed under an insured contract including the tort liability of another assumed in a business contract. Waiver of subrogation language shall be included. If necessary to provide the required limits, the Commercial General Liability policy's limits may be layered with a Commercial Umbrella or Excess Liability policy.

Commercial Auto Insurance. Insured shall maintain a Commercial Automobile Policy with a Combined Single Limit of not less than \$1,000,000; Underinsured and Uninsured Motorists limit of not less than \$1,000,000; Comprehensive; Collision; and a Medical Payments limit of not less than \$5,000. Coverage shall include Non-Owned and Hired Car coverage. Waiver of subrogation language shall be included.

Business Personal Property and/or Personal Property. Insured shall purchase insurance to cover Insured's personal property. In no event shall Certificate Holder be liable for any damage to or loss of personal property sustained by Insured, whether or not insured, even if such loss is caused by the negligence of Certificate Holder, its employees, officers or agents.

Workers' Compensation. Where required by law, Insured shall maintain all statutorily required Workers Compensation coverages. Coverage shall include Employer's Liability, at minimum limits of \$100,000 / \$500,000 / \$100,000.

Professional Liability. If professional services are supplied to the Institution, Insured shall maintain Professional Liability (Errors & Omissions) insurance on a claims made basis, covering claims made during the policy period and reported within three years of the date of occurrence. Limits of liability shall be not less than one million dollars (\$1,000,000).

If you have additional questions, please contact:

University of Idaho – Risk Management  
(208) 885-6177 or [risk@uidaho.edu](mailto:risk@uidaho.edu)

UNIVERSITY OF IDAHO REQUEST FOR PROPOSALS NO. 15-30M

PROPOSAL RESPONSE CERTIFICATION

3/3/2015

DATE

The undersigned, as Proposer, declares that they have read the Request for Proposals, and that the following proposal is submitted on the basis that the undersigned, the company, and its employees or agents, shall meet, or agree to, all specifications contained therein. It is further acknowledged that addenda numbers 1 to 3 have been received and were examined as part of the RFP document.

James Hersey

Name

James Hersey

Signature

Account Manager

Title

Ednetics, Inc.

Company

971 S. Clearwater Loop, Suite 1000

Street Address

Post Falls, Idaho, 83854

City, State, Zip

Ph: 208-777-4709 Fax: 208-777-4708

Telephone Number and Fax Number

208-777-5216

Cell Phone Number

Hersey@ednetics.com

E-mail Address

Idaho

State of Incorporation

84-1408391

Tax ID Number

Business Classification Type (Please check mark if applicable):

- Minority Business Enterprise (MBE) \_\_\_\_\_
- Women Owned Business Enterprise (WBE) \_\_\_\_\_
- Small Business Enterprise (SBE) \_\_\_\_\_
- Veteran Business Enterprise (VBE) \_\_\_\_\_
- Disadvantaged Business Enterprise (DBE) \_\_\_\_\_

Business Classification Type is used for tracking purposes, not as criteria for award.



Purchasing Services  
1028 West Sixth Street  
Moscow, Idaho 83844-2006  
208-885-6123  
208-885-6060  
[juliam@uidaho.edu](mailto:juliam@uidaho.edu)

Date: February 11, 2015

To: All Interested Proposers

From: Julia R. McIlroy, Director

Subject: Request for Proposals No. 15-30M ~ Unified Communications

This letter will serve as Addendum Number One to the above referenced Request for Proposals. The following clarifications have been made:

**Question #1:**

Since portability of many of your current telephone numbers would be required, can you send us the entire range of TN's intended to be ported to a new hosted VoIP/UCaaS solution? We presume any/all of the existing (10,000) DID's are required for porting. We would require the range of TN's intended to be ported to the hosted VoIP service, but do not require the analog line numbers intended to be kept as analog lines.

**Answer #1:**

*At a minimum we need numbers ported for all active devices (handsets and fax) which will be migrating to the new service. We also know that the 100-300 POTS lines described in 3.1.2.1 (L) will remain with our LEC and will not be ported. Our current active numbers are spread throughout the 208-885 block, from 208-885-0XXX to 208-885-9XXX. Since we have not dealt with this type and scale of porting before we look to you to recommend a solution that ports the numbers we need, while allowing for future growth, in a manner that is satisfactory to UI, you and our LEC.*

**Question #2:**

In section 3.2.3, paragraph V, the RFP states that many of the 200-300 existing fax lines could potentially be converted to virtual fax service in order to save money on those analog services, while some fax lines may potentially be kept as analog lines. Our

potential virtual and analog fax solution may depend on how many fax lines remain as analog lines. Can you give an approximation of how many fax lines would potentially remain analog?

**Answer #2:**

*No, we cannot provide an estimate. The rate of adoption of current fax lines migrating to a new solution will be based on the price/features/ease of use/etc. of the proposed solution. Note that our users will not be required to move to a new fax service. Use your experience with other installations to develop an estimate.*

**Question #3:**

Is the University of Idaho currently using or planning a future deployment of Microsoft Lync? If so, is it a requirement that the Lync client integrate with the phone for click to dial and phone presence?

**Answer #3:**

*Yes, Lync is being used for IM and video collaboration. Lync is not currently integrated with a PSTN and this type of integration is not a requirement for the product we select. However, if your product can integrate into our Lync environment we would like to hear about it.*

**The closing date, and all terms and conditions of the RFP remain the same.**

Failure to acknowledge this addendum may result in rejection of your proposal. Acknowledgement should accompany your offer.

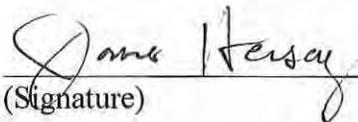
If you need additional information, please call (208) 885-6123, or e-mail [juliam@uidaho.edu](mailto:juliam@uidaho.edu).

Thank you for your interest in the University of Idaho.

Ednetics, Inc.

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(Company)



---

(Signature)



Purchasing Services  
1028 West Sixth Street  
Moscow, Idaho 83844-2006  
208-885-6123  
208-885-6060  
[juliam@uidaho.edu](mailto:juliam@uidaho.edu)

Date: February 16, 2015  
To: All Interested Proposers  
From: Julia R. McIlroy, Director  
Subject: Request for Proposals No. 15-30M ~ Unified Communications

This letter will serve as **Addendum Number Two** to the above referenced Request for Proposals. The following clarifications have been made:

- In addition to eight (8) hard copies, please submit an electronic copy of your proposal to [juliam@uidaho.edu](mailto:juliam@uidaho.edu) by RFP due date.
- Please submit proposal shipment tracking number to [juliam@uidaho.edu](mailto:juliam@uidaho.edu) by RFP due date.

**The closing date, March 3, 2015, and all terms and conditions of the RFP remain the same.**

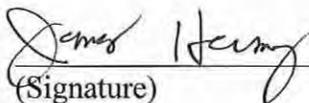
Failure to acknowledge this addendum may result in rejection of your proposal. Acknowledgement should accompany your offer.

If you need additional information, please call (208) 885-6123, or e-mail [juliam@uidaho.edu](mailto:juliam@uidaho.edu).

Thank you for your interest in the University of Idaho.

Ednetics, Inc.

\_\_\_\_\_  
(Company)

  
\_\_\_\_\_  
(Signature)



Purchasing Services  
1028 West Sixth Street  
Moscow, Idaho 83844-2006  
208-885-6123  
208-885-6060  
[juliam@uidaho.edu](mailto:juliam@uidaho.edu)

Date: February 18, 2015  
To: All Interested Proposers  
From: Julia R. McIlroy, Director  
Subject: Request for Proposals No. 15-30M ~ Unified Communications

This letter will serve as **Addendum Number Three** to the above referenced Request for Proposals. The following clarifications have been made:

**Number of trunk lines:** We have minimal information available to us but can provide the following. The Centranet system in Moscow has 170 NARS available. We cannot provide information on utilization. So, for the approximately 3,400 Centranet lines in use today the 170 NARS represent a ratio of approximately 20 to 1 – lines to trunks. This ratio works well for us at the Moscow site so it is a safe assumption that your solution would work well with a similar ratio. As always we will want to hear about how your system meets our needs.

**Number of MACDs per month:** Approximately 100 per month. This estimate is based on an average of busy and slow months for moves, adds, disconnects and changes. It includes v-mail password resets and delivering or changing equipment. Monthly volume ranged from 158 orders in a busy month down to 35 orders in a slow month.

**Diagram:** See attached pdf.

**Please note: written inquiries concerning the attached diagram can be submitted until February 21, 2015.**

**The closing date, and all terms and conditions of the RFP remain the same.**

Failure to acknowledge this addendum may result in rejection of your proposal. Acknowledgement should accompany your offer.

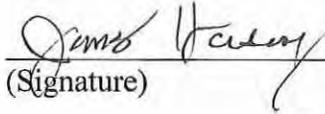
If you need additional information, please call (208) 885-6123, or e-mail [juliam@uidaho.edu](mailto:juliam@uidaho.edu).

Thank you for your interest in the University of Idaho.

Ednetics, Inc.

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(Company)



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(Signature)

**SECTION 2 - PROPOSER QUALIFICATIONS AND INFORMATION**

**2.1 CONTACT INFORMATION**

Provide contact information for the Proposer and any other components (describe) proposed as part of the solution

Proposer – core product/service		Email Address	Phone
Ednetics Voice	Account Representative James Hersey	james.hersey@ednetics.com	208.262.2014
Ednetics Voice	Contract Executive Matthew Baird	matthew.baird@ednetics.com	208.262.2065
Ednetics Voice	Sales Engineer Scott Duchow	scott.duchow@ednetics.com	208.619.2664
Additional components		Email Address	Phone
	Point of Contact		
	Point of Contact		

**2.2 PROPOSER INFORMATION**

Provide information for the following:

- A. Parent company (if applicable): **Ednetics, Inc.**
- B. State of incorporation: **Idaho**
- C. Federal identification number: **84-1408391**
- D. Idaho business license number: **000672682-5**
- E. Size of organization: **100+ employees**
- F. Total number of installed base customers: **40+ Ednetics Voice, 60+ Managed On-Prem**
- G. Total number of installed base users licensed: **22,000+ Ednetics Voice, 20,000+ Managed On-Prem**
- H. How long has your solution been based on the proposed platform? **4 years Ednetics Voice, 11 years On-Prem**
- I. Describe your certifications and credentials that indicate your expertise and commitment to a cloud solution practice. Also provide specific designations that identify specialty areas of focus and capability.

Ednetics holds the following certifications that indicate our expertise and commitment to a cloud solution practice: Cisco Advanced Data Center Architecture, Advanced Collaboration Architecture, Advanced Security Specialization, Advanced Routing and Switching Specialization, TelePresence Video Express ATP (invitation only program).

Over the past 5 years, Ednetics and owned interests have invested over \$25 million in data center facilities, telecommunications, fiber infrastructure and software development around enterprise cloud solutions for K12 and Higher Education. By leveraging strong partner relationships with Cisco and other manufacturers, Ednetics has grown to be one of the largest service providers in the Northwest.

- J. Please provide a list and relationships of any other legal entities proposed in the delivery of these service.  
N/A.

**2.3 KEY PERSONNEL**

**2.3.1 PROPOSER PERSONNEL**

The proposal must include a list of project team members, including technical staff, available to service equipment at the customer premises, as well as at the hosted site, during and after the installation.

The University prefers to retain the same key personnel, including Proposer's Project Manager and Software Engineer(s), over the length of the project. Any unavoidable changes in key personnel must be communicated to the University in writing with as much advance notice as possible.

Using the following table, provide a list of the proposed project team members. The list shall include the role and responsibility for each team member and any pertinent certifications they have obtained.

Specific roles that should be itemized include:

- A. Project Manager
- B. System Engineer (for each proposed system)
- C. Trainer

Name	Experience	Office Location	Role/Tasks; Product Focus
Rich Neel	3 years Ednetics as IT Project Manager  15 years total Project Manager	Ednetics Inc. Post Falls, Idaho	IT Project Manager; Evaluating requirements, establishing solid communication plans, applying repeatable project management processes, coordinating comprehensive quality control measures, create and maintain project plans, manage risk and facilitate decision making at all levels of stakeholders and management. Projects range in size and complexity from small wireless LAN installations, large-scale school district Voice installations, to very large multi-national software application deployments.
Mike Higdon	4 years Ednetics as IT Project Manager	Ednetics Inc. Post Falls, Idaho	IT Project Manager; Evaluating requirements, establishing solid communication plans, applying repeatable project management processes, coordinating comprehensive quality control measures, create and maintain project plans, manage risk and facilitate decision making at all levels of stakeholders and management. Projects range in size and complexity from single building LAN and WLAN installations, to district wide technology upgrades including multiple data centers and redundant LAN infrastructure.
Josh Gross	4 years Ednetics as Voice Engineer	Ednetics Inc. Post Falls, Idaho	Senior Voice Engineer; Design and install customized on premise Cisco UC systems, provide tier-3 support for Cisco UC systems, research/test/deploy emerging technologies in the UC arena, design/maintain/develop Ednetics Hosted Voice solutions, primary technical resource for UC system.

Scott Duchow	4 years at Ednetics as Voice Engineer	Ednetics Inc. Post Falls, Idaho	Voice Field Engineer; Develop training sessions tailored for customer requirements, provide lecture based training, facilitate hands-on training labs, author training documentation, design and install customized Cisco Voice systems, work closely with the customer to define objectives, ensure high customer satisfaction throughout project completion
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**2.3.2 UNIVERSITY PERSONNEL**

Provide a list of team member roles, quantities of each, and the expected duration personnel are needed, to support the implementation of the service, that the University will need to dedicate to this project.

Role and Description	Quantity needed	Estimated effort and duration needed by role
Project Sponsor / Key authority stakeholder	1	Approval authority - presence as requested / duration of project
Project Manager / Primary Project Point of Contact	1	Project oversight throughout duration of project
Voice Point of Contact / University TelCo counterpart	1	TelCo, existing services info, quality of service verification - duration of project
Network Point of Contact / University Network counterpart	1	Local & Wide Area Network support - duration of project
University Technical staff	1-4 per site	Give site access, handset deployment, and as needed

**2.3.3 CUSTOMER REFERENCES**

The Proposer must submit a minimum of three (maximum of five) relevant customer references for which the Proposer has provided a similar solution within the last three years. The systems must be currently in full production use and be of similar size and complexity to the University. The solution must be presently in full production use (sales pending implementation of key components do not qualify). References of all Proposers may be contacted at any time throughout the RFP process.

Reference 1– Client Name: Washington State University – Vancouver Campus	State: Washington	Type of Business: Education
Contact Name: Chuck Harrsch	Job Title: Network Manager	Phone Number: 360.546.9771
System Replaced: N/A – New Campus	Email Address: harrsch@vancouver.wsu.edu	
Number of Users: 650	When Implemented: May 2009	
Description / Notes: Managed service with Unified Messaging, MeetMe Audio Conferencing and Attendant Console. Cisco switching deployment.		

Reference 2 – Client Name: Washington State University, Puyallup Campus	State: Washington	Type of Business: Education
Contact Name: Vernene Schurer	Job Title: IT Manager	Phone Number: 253.445.4509
System Replaced: Nortel PBX	Email Address: vernene.scheurer@wsu.edu	
Number of Users: 170	When Implemented: May 2014	
Description / Notes: Hosted Voice Service with Unified Messaging, MeetMe Audio Conferencing, Single Number Reach, Video Calling with Video Phones, Survivable Remote Site Telephony, Active Directory and Microsoft Office Integration, Ednetics IP Faxing, Cisco Jabber with desk phone control and soft phone. Cisco switching deployment.		
Reference 3 – Client Name: Yakima School District	State: Washington	Type of Business: Education
Contact Name: Andy Gonzalez	Job Title: Director of Technology	Phone Number: 509.573.7000
System Replaced: Nortel PBX	E-mail Address: Gonzalez.andy@yakimaschools.org	
Number of Users: 2000	When Implemented: July 2014	
Description / Notes: Hosted Voice Service with Unified Messaging, MeetMe Audio Conferencing, Single Number Reach, Video Calling with Video Phones, Survivable Remote Site Telephony, Active Directory and Microsoft Office Integration, Ednetics IP Faxing, Cisco Jabber with desk phone control and soft phone. Cisco switching deployment.		
Reference 4 – Client Name: Coeur d'Alene School District	State: Idaho	Type of Business: Education
Contact Name: Seth Deniston	Job Title: Director of Technology	Phone Number: 208.664.8241
System Replaced: Nortel PBX	Email Address: sdeniston@cdaschools.org	
Number of Users: 1000	When Implemented: July 2013	
Description / Notes: Hosted Voice Service with Unified Messaging, MeetMe Audio Conferencing, Single Number Reach, Video Calling with Video Phones, Survivable Remote Site Telephony, Active Directory and Microsoft Office Integration, Ednetics IP Faxing, Cisco Jabber with desk phone control and soft phone. Cisco switching deployment.		

Reference 5 – Client Name: Moscow School District	State: Idaho	Type of Business: K12 School District – All Campuses
Contact Name: Jennifer Johnson	Job Title: Finance Specialist	Phone Number: 208.892.1122
System Replaced: On premise Cisco Voice	E-mail Address: johnsonj@msd281.org	
Number of Users: 400	When Implemented: October 2014	
Description / Notes: Hosted Voice Service with Unified Messaging, MeetMe Audio Conferencing, Single Number Reach, Video Calling with Video Phones, Survivable Remote Site Telephony, Active Directory and Microsoft Office Integration, Ednetics IP Faxing, Cisco Jabber with desk phone control and soft phone. Cisco switching deployment.		

## **SECTION 3 - TECHNICAL AND FUNCTIONAL SPECIFICATIONS**

Ednetics acknowledges all Technical and Functional Specifications from Section 3.1 through Section 3.1.3.7.

### **3.2 DESIRED ENVIRONMENT**

The technical requirements below are purposely described in fairly broad terms. UI is providing basic and essential information so that Proposer can get an understanding of what we are looking for in a cloud-based Unified Communication service. Proposers are encouraged to ask for clarification as needed. UI is open to innovative solutions - use your expertise and experience to apply creativity to design a solution that exceeds our expectations.

#### **3.2.1 INFRASTRUCTURE / ARCHITECTURE / SYSTEMS / NETWORK**

We are looking for a cloud-based / hosted service that can provide uptime / availability similar to a local PBX. We understand that a robust systems and network infrastructure is necessary to provide a high quality UCaaS service. We want the Proposer to describe the multiple aspects of Proposer's underlying architecture that allow Proposer to prevent, predict, minimize and resolve system events and outages while simultaneously providing a service with excellent / scalable performance and capacity.

##### **3.2.1.1 Reliability and Availability**

- A. Describe how you maintain high levels of service reliability and availability. Please differentiate network architecture from systems architecture, while also including factors that are common to both. For example, geographically diverse data centers, redundant network connectivity, redundant carrier connectivity, shared or dedicated tenant resources, mature internal processes for planned maintenance, systems monitoring, capacity planning, diverse pathway, multiple upstream providers, etc.

Ednetics Voice utilizes geographically separated datacenters with either datacenter able to provide all services. Within the datacenters every component has a redundant or load balanced counterpart that is able to handle the load should a failure occur. Our provider network (Ednetics Connect) is a carrier grade IP network that is monitored 24/7/365. The network utilizes virtual separation using virtual routing fabric (VRFs) and virtual local area networks (VLANs) to maintain dedicated tenant resources and operates from geographically separate and redundant datacenters to ensure access to resources at any time. Ednetics Connect contains redundant paths to the datacenters using separate carriers and separate routes. All links are also monitored for usage; upgrades to links will be performed as the need arises. We interface with our public switched telephone network (PSTN) carriers at multiple locations within our geographic footprint. This allows us to load balance as well as handle inbound/outbound calling in the event of a site/equipment failure. Our planned maintenance policy includes at least 72-hour notification for the off-hours scheduled maintenance.

The actual voice service is comprised of a cluster of applications distributed throughout our datacenters. Each voice cluster is unique and dedicated to a specific customer. This allows for custom integration capabilities as well as full administrative access for the University staff.

We plan for the University of Idaho Ednetics Voice service to be delivered on redundant, private and dedicated circuits using a diverse path. The equipment used to terminate these circuits will also be utilized for local dial tone in the event of an outage or service disruption with survivable remote site telephony (SRST).

Please reference Appendix A for Ednetics Voice Network Topology.

- B. Provide uptime statistics and details on the root cause of any significant service interruptions over the past 2 years. Our service has achieved uptime greater than 99.999% for the past 2 years.

Ednetics Voice has never suffered any significant data center, service failure, or loss of connection with our PSTN providers. Should an outage arise, root cause analysis will be included in the outage notification resolution. We build redundancy into our service through our provider network routing capabilities and our geographically separated datacenters. Should a major outage affect the Moscow or remote campus, there are mechanisms in place to handle calling or route calls to a secondary location. By abstracting the dial tone from the local site/s

additional resiliency is added. This enables our customers to handle calls and notify callers of a major disturbance in the region.

In October of 2013, a major windstorm knocked out power in central Washington leaving a city without power and local dial tone for days. Because this customer's dial tone was terminated with Ednetics in our datacenters we were able to update call recordings to inform callers of the current situation.

The benefits to using Ednetics Voice are that during instances such as this power outage, phone numbers can be routed to areas with power for handling of calls.

### 3.2.1.2 Failure Scenarios

Describe how the proposed service will be impacted in the following failure scenarios:

A. Upstream Service Provider failure

Our PSTN service providers route traffic to all of our datacenters. We use Dynamic Failover which automatically detects any given outage and provides failover to a second data connection without the need for user or administrator intervention. Together, these features help to ensure reliability and uptime of 99.99 percent or greater.

B. Primary data center failure

The datacenters are designed so that any site is able to carry the load of the complete service. Our datacenters are designed to be active-active. If a failure happens in one site, the other sites are already active and servicing our customers.

C. Denial of Service attack

Our service is not exposed to the Internet at any time, eliminating this risk. Customer networks are segregated from each other using VRF and VLAN technology to prevent data spillage or disruption from other customer networks. These services support segmentation which provides visibility, control, and overall secure service delivery.

D. DNS failure

Ednetics Voice does not use DNS for our service delivery, so a DNS failure would not affect Voice service.

E. UI primary Internet Service Provider failure

Ednetics Voice does not utilize a customer's Internet connection; therefore, a U of I ISP failure would not affect Ednetics Voice service. A private, dedicated and redundant link/s will be installed as part of the service.

F. UI primary data center failure

Ednetics Voice will not include any onsite server hardware that would be impacted by a U of I primary data center failure. The private delivery network termination points could be located in the data center. If the failure affected these components, there could be a service disruption. As part of our proposal, Ednetics has designed diverse points of entry into your WAN/LAN to reduce the risk of service disruption by a U of I primary datacenter failure.

G. UI WAN connectivity failure for one or more WAN sites

Local Survivable Remote Site Telephony (SRST) routers will be utilized for calling in a degraded network environment. We have included additional SRST routers for these locations. The type and quantity of calls able to be placed outside of the University will be a design criteria discussed with the University. In addition to SRST "Call Forward Unregistered" settings can be manipulated to send calls to a cell phone or other department should a phone or group of phones become inaccessible through the network.

## H. Network failure in or between UI buildings

If the U of I network has failed, call forward settings would be leveraged for service delivery. We recommend in this scenario that you contact our Support team immediately for additional call delivery options. Ednetics Support staff will partner with your team to resolve the issue.

Campus network and associated LAN routing are responsibilities of the University. Ednetics recommends redundant and diverse network paths to routing points. Should an outage disrupt LAN routing, the phones will attempt to fall back to a local gateway for voice services known as SRST. This will allow phones to use their SRST reference to make calls during a network disruption.

## I. UI email environment offline

Ednetics Voice offers Single Inbox for voicemail delivery to an e-mail inbox, but this is not required for voicemail storage. If Single Inbox is utilized and the email solution is offline messages will be maintained in the voicemail server, when service is restored messages will sync as appropriate.

## 3.2.1.3 Performance

Describe how you ensure that the proposed service remains responsive and scalable. For example, deterministic networks, QoS, dedicated/private networks, peering agreements, monitoring, capacity planning, etc.

This service is delivered on a private and dedicated network to the customer site. We peer directly with other provider networks to route traffic directly to our customers from our datacenters. Our provider network is monitored 24/7 by Ednetics staff. The capacity of the links we provide are determined by the quantity of calls and type of calling expected (video/audio). We also monitor the traffic patterns of the circuit and will proactively increase the capacity as needed.

## 3.2.2 NETWORK INTEGRATION

## 3.2.2.1 Integration

Proposer's solution will need to integrate into the existing UI network infrastructure.

- A. UI is working under the assumption that the proposed solution will work with existing UI network equipment. Point out any exceptions to this assumption.

Ednetics does not foresee any exceptions to the assumption that the proposed solution will work with the existing UI network equipment.

- B. UI needs Proposer to develop a comprehensive list of recommended or required UI network capabilities and changes. At a minimum we are looking for your input on the following: VLAN, QoS, stateful firewall configuration, private network peering, DHCP and DNS, IP subnets, location information (E911), IP addressing and routing.

There is a network recommendations document that includes these details and will be shared as part of the project. This document covers QoS, VLAN design, and routing. DHCP, IP addressing and E911 location information is at the discretion of the University. Ednetics will aid in the design of these elements as needed.

Ednetics will be implementing QoS throughout the provider network to the customer site. We will work with the University staff to ensure their LAN environment has the appropriate QoS markers and other network recommendations.

- C. Describe your process for managing a robust end-to-end network service/infrastructure where a significant portion of that network (UI LAN and WAN) is not under Proposer's direct control.

Ednetics incorporates monitoring tools into our service, tracking everything from server process health all the way down to end point registrations. These indicators will alert our Support and Engineering teams in the event of a disruption or alert to initiate our resolution process.

If a University user identifies a Voice related service disruption, a University tech staff member will open a trouble ticket with our Support Desk. Depending on the tickets priority or severity, the appropriate Support personnel will be notified to remedy the issue or escalate if necessary.

Our team will partner with your team, remotely, in troubleshooting should a voice issue involving the U of I LAN/WAN arise.

### 3.2.3 TELEPHONY

UI realizes that there are hundreds of telephony features available on the current generation of systems and most of them work similarly from manufacturer to manufacturer. We are interested in learning about the telephony features and characteristics that your solution offers that distinguishes it from competitors' solutions.

We need flexibility in regards to which UCaaS features are offered to our customers and when they are offered. Given fixed resource levels we need to control the pace at which "advanced" functionality is implemented. We want to start with the basics, and do them well, before offering advanced features to all University employees. For example, during implementation we expect to provide all current telephone users with a physical IP handset as opposed to migrating some users to softphones.

#### 3.2.3.1 System-Level Features and Functionality

- A. Describe how you make any applicable system-level features and functionality accessible to persons with disabilities.

Cisco complies with the Americans with Disabilities Act (ADA), Section 255 of the U.S. Telecommunications Act, and the U.K. Disability Discrimination Act. We also strive to conform to Section 508 of the U.S. Rehabilitation Act and other legislation. In addition, Cisco's employee intranet complies with U.S. regulations and the Web Accessibility Initiative, which is an independent consortium working with organizations worldwide to develop strategies, guidelines, and resources to help make the web accessible to people with disabilities.

In addition, Cisco participates in standards-development committees run by the International Telecommunications Union (ITU), Internet Engineering Task Force (IETF), and Telecommunications Industry Association (TIA) to help ensure that our products meet the highest international standards.

Cisco's open, standards-based IP solutions combine the features of traditional systems with new innovative applications that improve accessibility. For example, IP telephony, unified messaging, instant messaging, and Cisco's Personal Assistant provide increased accessibility to create a more productive and collaborative workforce.

In addition to Cisco's own products such as SpeechConnect, Cisco has relationships with leading third-party vendors and has tested and achieved compatibility with their assistive technologies and devices to achieve optimal and innovative accessibility in communications networks.

- B. Interoperability / coexistence – Your solution must coexist with the existing Centranet system in Moscow for the duration of the Moscow cutover. At a minimum you will need to support 5-digit dialing and ANI between the Centranet system and your solution. We expect cutovers outside of Moscow to be flash cuts and therefore do not expect a need to interoperate between old and new systems at these locations. Describe how Proposer will meet these expectations.

The Moscow campus will have a Cisco ISR installed as part of the voice service. This router will be used for PBX integration. The directory number ranges for the Centranet system will be routed from Ednetics Voice through this router and vice versa.

Ednetics has vast experience in phone system transitions of thousands of phones at a time. Our recommendation would be to treat each site as a flash cut including the main campus.

C. Analog Devices – In your response, keep in mind that we differentiate between “POTS” and “analog”. As stated previously mentioned, we will maintain a separate POTS contract for critical phone lines. These critical (POTS) lines cannot traverse an IP network and cannot rely on local / commercial building power and are therefore outside the scope of your response. The analog lines for which we need you to provide a solution are non-critical and can be offline if the IP network or building power is unavailable. Examples of analog lines are fax machines and speakerphones.

- i. Describe what it will take to supply dial tone to analog devices such as fax machines and speakerphones. As previously described, UI does not own copper infrastructure between buildings.

Analog devices are interfaced through Analog Telephone Adapters (ATAs). These devices utilize the IP network and have analog ports. Also included with the service is an eFaxing solution. The Analog User charge in the contract entitles the University to either an ATA or eFax device. Ednetics would recommend transitioning to IP speaker phones to increase flexibility while reducing the overall cost and complexity.

D. Call Logging and CDR – How are call log data and call detail records made available to us? For example, real time or batch downloads, available for download, sent to UI logging host, etc.

Call logs are accessible through Ednetics Portal, which supports real time and batch downloads, and is also available directly through the Call Manager. If needed, the logs can also be automatically exported to a logging host.

E. Reporting – Describe the reporting environment available to UI. For example, web-based, utilization statistics, errors, etc.

Reporting elements are accessible through Ednetics Portal. Ednetics Portal is a web based tool that features usage statistics.

Please see Section 4 for an example of Ednetics Portal.

F. Trunking Requirements –

- i. Provide information on how your included trunking solution will meet our current and future needs. How do you calculate the number of trunks required? What assumptions do you make as part of this calculation?

Ednetics Voice transmits voice calls via SIP. To calculate the capacity required we take the expected busy hour call volume and multiply it with the bandwidth utilization of a call. We have monitoring solutions in place to send alerts if the usage is approaching the link capacity and will increase the link size as appropriate.

Ednetics is planning the initial capacity at 175% of an increase over your current calling capacity.

- ii. What options and limitations does UI need to consider?

The University should consider analog capacity for the SRST routers if they are desired.

G. ACD / Call Center– A few UI departments could benefit by implementing (basic) call center functionality. Provide a description of the ACD/Call Center functionality of your product.

Unified CM provides call queuing natively to users so that callers can be held in a queue until hunt members are available to answer them. Callers in a queue receive an initial greeting announcement followed by music on hold or tone on hold. If the caller remains in queue for a period of time, a secondary announcement is played at a configured interval until the call can be answered—or until the maximum wait timer expires.

Call Queuing Operation:

The Call Queuing feature provides an enhanced capability to handle incoming calls to a hunt pilot number.

When an incoming call reaches the hunt pilot, the following capabilities are provided:

- A caller may be connected to an initial customizable greeting announcement before proceeding
- If one or more line members are logged into the hunt pilot and are in an idle state, and if no calls are queued, then the call is extended to the line member that has been idle for the longest period of time.

- If no line members answer a call, then that caller will not be placed in queue. The call is routed to a new destination, or a voicemail box, based on the setting under "When no hunt members answer, are logged in, or registered."
- Calls will be placed in queue only if all members are busy.
- If a line member does not answer a queue-enabled call, that line member is logged off the hunt group only if the setting "Automatically Logout Hunt Member on No Answer" is selected on the line group page.
- While the caller is in the queue they may hear Music On Hold and a repeating (customizable) periodic announcement.
- Once a line member becomes idle, the caller with the longest wait time across multiple hunt groups is extended to the idle line member. If the idle line member does not answer the call, the caller is returned to their previous position in the queue.
- If a queued call exceeds its maximum wait time, it can be routed to another pattern or it can be disconnected, depending upon how the hunt pilot configuration is configured.
- If the maximum number of callers allowed in queue has been reached, any subsequent caller can be routed to another pattern or disconnected, depending upon how the hunt pilot configuration is configured.
- Line members can display the queue status of their queue-enabled hunt pilots (in other words, the hunt pilots with which they are associated). The queue status display provides the following types of information:
  - Hunt pilot pattern
  - Number of queued callers on each hunt pilot
  - Longest waiting time

If advanced call center features, including reporting, IVR, and database dips are required, they can be purchased separately through Ednetics.

- H. Basic features filtering – Describe the ability of your system to limit the quantity and type of end-user features provisioned to individual handsets such as courtesy phones in public areas. For example, templates, Class of Service, groups, etc.

Each phone can be limited as needed for inbound/outbound calling. Ednetics Voice utilizes Class of Service to restrict types of calls, which may be placed as well as Forced Authorization Codes for a user to override if needed. The implementation of these features will be fine-tuned during the project's design phase.

- I. Voicemail / Unified Messaging –

- i. Provide a detailed overview of your voicemail product including its integration with our hosted Microsoft Office 365 (Exchange) email environment.

The voicemail component included in this proposal is Cisco Unity Connection (CUC). CUC may be integrated with Office 365 for voicemail delivery to a user's email inbox. This is configurable on a per-user basis. When a voicemail is reviewed it will update the Message Waiting Indicator on the phone, or mark the email message with voicemail attachment as "read."

Cisco Unity Connection lets users access and manage messages from an email inbox, web browser, Cisco Jabber, Cisco Unified IP Phone, smartphone, or tablet. Unity Connection also provides flexible message access and delivery format options, including support for voice commands, speech-to-text transcription, and even video greetings.

Cisco Unity Connection is highly secure. It is designed for complex distributed global deployments with support for high availability, redundancy, and branch office survivability. It is fully virtualized, and can be run on specification-based hardware.

Unity Connection is easily deployed, provisioned, monitored and managed using Cisco Prime Collaboration, our single application for unified management of the entire voice and video deployment.

- ii. Is user-level granularity available for deciding if voicemail is kept on the telephony system or sent to email?

Yes, this is configurable on a per user basis.

- iii. Describe the functionality your product offers for voice-to-text transcription of voice mail messages.  
Cisco Unity Connection (CUC) has an optional feature called Speech View that enables voice to text transcription of voicemails to email.
  
- J. Conferencing – The University would prefer that the full capabilities of an audio conferencing (bridge) suite be included with your solution. Please describe the features, options and capacity of your solution.  
Ednetics Voice includes a software conferencing bridge capable of servicing audio conferencing via Ad-Hoc or MeetMe conferencing. Ad-Hoc is when a user initiates a conference call with another IP phone or outside caller. MeetMe is a conferencing bridge that can be called into internally or from an outside caller. These conferences are usually configured to limit participation to 15 callers, but that number may be increased based on the need. The total capacity of the solution will be determined in the design review phase of the project as we have the ability to offload conferencing to resources deployed with the solution.
  
- K. Toll-free Calling – The preferred solution would have unlimited toll-free calling, similar to cellular phone calling plans.
  - i. Describe the features and limitations of your inbound and outbound toll-free calling. For example: local only, US only, North America only, international, etc.  
This service includes unlimited domestic long distance which is defined as the 50 US states and Canada. International calling is a toll charge and the rates are included in the terms and conditions of the contract. Inbound toll-free is available with Ednetics Voice and the rates are also included in the terms and conditions of the contract.
  - ii. Will UI need to maintain an agreement with a separate long-distance carrier?  
No.
  
- L. Toll Calling – How do you maintain competitive toll call rates and how do you differentiate yourselves from your competitors on those rates?  
Toll calls through Ednetics Voice are international calls (except for Canada), inbound toll-free, and directory services (411, etc.) The rates for each are defined in the terms and conditions of the Voice contract. We work with our upstream providers to provide competitive rates for our customers. With the inclusion of domestic long distance as described in the Toll-free Calling section we see a great reduction in the quantity of toll calls for our customers.
  
- M. Toll Call Blocking – Describe how your service offers configurable toll call blocking options. For example - blocking of toll calls at a default per line level, requiring a PIN for toll calls, inbound collect call blocking, blocking inbound 3rd-party calls, etc. – Question to Josh  
Class of service restrictions allow for blocking toll calls or requiring a PIN to proceed with a call that would incur a charge. This can be restricted or granted to a per-user or per-line level.
  
- N. ANI – Outbound ANI must be controlled and customizable by Class of Service and by individual line. Inbound ANI data must be available to peripheral devices, including voicemail systems and analog extensions.  
We comply with this requirement.
  
- O. Local / DID number porting – We need you to port our existing local/DID numbers into your solution. In all locations, except Idaho Falls, migrated users will be keeping their current phone numbers.  
We comply with this requirement.
  
- P. 800 service porting – We will need you to port our existing "1-800" numbers and services into your solution.  
We comply with this requirement.

- Q. Survivability – We expect dial tone survivability to be implemented at each site. Describe the capabilities and options of your solution in providing local dial tone survivability when a site’s external network is offline.

The routers used to terminate the private circuits are used as Survivable Remote Site Telephony (SRST) routers if the external (provider) network is inaccessible. These are included with the service at no additional charge. In SRST mode local calling is available to phones that are routable on the network. POTS or other voice circuits may be connected to these SRST routers to be used in the event the service was disrupted and outside calls need to be placed. We recommend some of these lines be reserved for 911 or emergency type calling. Additional SRST routers have been included to service the remote sites in the event their WAN connection is disrupted.

- R. E911 and Location – We will prefer a solution where comprehensive E911 services are integrated.

- i. Provide details on your recommend E911 solution including, 911 & 9-911 (or other leading digit dialing) support, maintenance of databases, processes for transferring location information, processes for keeping location information updated, validation of location information, monitoring of 911 calls by University safety staff, etc.

Ednetics Voice includes a comprehensive E911 service called Cisco Emergency Responder (CER).

Dialing 911 or 9-911 will route the call as an emergency call. The final details of the design will depend on the University’s E911 zoning requirements. Ednetics Voice standard E911 recommendation is to zone by building. This allows for building specific information to be passed to the Public Safety Answer Point (PSAP). In addition to the PSAP notification an internal alert to desk phones, cell phones, and an email message detailing which extension is in emergency will be sent to personnel identified by the university. Typically this will be any first responders within a given area, the front office or reception area of a building, and any other key staff for an emergency.

The maintenance of the database will be a shared responsibility between the University and Ednetics. The University will need to notify Ednetics of changes that need to be made (address information, notification personnel, etc.) for processing and update with Intrado. If switch port level zoning is required the University staff will provide a port map of each zone’s switch port coverage.

The Ednetics Voice system automatically updates a phone’s zone, ID based on the Cisco switch port information programmed (HP will be limited to per building zoning). This means if a phone is moved to a new building location and 911 is dialed, the physical location of the phone will be relayed and associated internal notifications sent.

- ii. How will E911 location information be collected from the UI environment? Include information for handsets, softphones, and wireless handsets

University staff will need to provide the addressing and zoning information to be programmed into the system. The details required will be identified in the design phase of the project based on the requirements. As an example: if building zoning is required, we will need the building’s physical location information and the associated IP subnet to track; if port-level tracking is required (requires Cisco Switching) a switch port map and associated zone information (building address, room/wing/floor information as appropriate) will need to be provided to Ednetics.

- S. Paging / Intercom –

- i. Describe how your solution allows paging/intercom functionality through the IP handsets.

Ednetics Voice includes Singlewire Basic Paging that allows for paging for up to 50 handsets simultaneously. There is an intercom function built into the phone system that can be configured based on the University’s needs. If a more robust emergency notification system is required, an option will be provided for Singlewire Informacast Advanced Paging.

- T. Directory – The ideal solution will integrate with UI’s Active Directory.

- i. Describe the directory services your solution provides.

Ednetics Voice polls Active Directory (AD) for the phone system’s corporate directory. In areas where AD is not available or a user is not included in AD, a local user can be configured into the phone system for lookup and authentication.

- ii. Does your solution integrate with Active Directory? If so describe the requirements to implement and the benefits.

Yes this service does integrate with Active Directory. The AD requirements are a service account able to query AD for the phone system to use, ability to route to AD through the network, and significant AD fields populated for polling. For example, directory number is sometimes used as a key for polling.

- U. Attendant Consoles – Provide a description of the options available to support attendant consoles.

A third party attendant console product may be used with this solution. Any third party application supported by Cisco can integrate with this solution. Ednetics has experience integrating Akkadain Labs attendant console, an option can be provided for this service if requested.

- V. Hosted Fax Service – UI currently has at least 200-300 analog fax devices in use. We believe that many of these devices/lines could be removed from service (saving money) if your solution offers an acceptable virtual / network-based fax alternative.

- i. Describe the network-based fax service that is included with your solution. How would it integrate with our current email system?

Ednetics Voice's IP faxing service uses Simple Mail Transfer Protocol (SMTP) send connectors within the University's email system to send an email attachment as a fax through the PSTN. To send a fax a user sends an email from their University messaging client to a phone number with a custom faxing alias (@fax.uofi.edu as an example) that will transform the email's subject, body and attachments into a fax for transmission.

Incoming faxes to the U of I through the IP faxing service will be sent to the recipient's email inbox. A fax may be received by an individual user or sent to an email distribution list as requested.

- ii. Does it support sending faxes directly to employee's phone numbers?

Faxing is supported only to numbers associated to the faxing service.

- iii. What options are available for routing inbound faxes?

Inbound faxes can be routed to an individual user's mailbox, email distribution list, or Multi-Function Printer (if supported).

- iv. Describe outbound fax features and requirements from the perspective of desktop and mobile clients.

Outbound faxing will automatically generate a cover sheet and use the email message's subject, body, and attachments (.docx, .pdf, .jpg, .txt, .xlsx) for the content. Sending a fax must be done through the user's University email account.

- W. Toll Fraud – Describe the ability of your solution to prevent toll fraud, and your processes for working with the customer to prevent unauthorized charges.

We proactively block calling to areas of high toll fraud activity. If calls are needed to be placed to these locations, University staff will need to request these areas to be unblocked. Forced Authorization Codes (FACs) can be used to alert a caller that the number they are dialing will incur a charge. FACs are intended to be user specific.

- X. Texting – Describe how your system supports SMS texting. For example: service users receiving text messages through their desktops, e-mail, or handsets; service users sending SMS text messages from their desktops, e-mail, or handsets, etc.

Third party messaging services may be integrated if supported by Cisco for Unified Communications Manager.

### 3.2.3.2 User-Level Features and Functionality

- A. Describe how you make end-user features and functionality accessible to persons with disabilities.

Cisco complies with the Americans with Disabilities Act (ADA), Section 255 of the U.S. Telecommunications Act, and the U.K. Disability Discrimination Act. We also strive to conform to Section 508 of the U.S. Rehabilitation Act and other legislation. In addition, Cisco's employee intranet complies with U.S. regulations and the Web Accessibility Initiative, which is an independent consortium working with organizations worldwide to develop strategies, guidelines, and resources to help make the web accessible to people with disabilities.

In addition, Cisco participates in standards-development committees run by the International Telecommunications Union (ITU), Internet Engineering Task Force (IETF), and Telecommunications Industry Association (TIA) to help ensure that our products meet the highest international standards.

Cisco's open, standards-based IP solutions combine the features of traditional systems with new innovative applications that improve accessibility. For example, IP telephony, unified messaging, instant messaging, and Cisco's Personal Assistant provide increased accessibility to create a more productive and collaborative workforce.

In addition to Cisco's own products such as SpeechConnect, Cisco has relationships with leading third-party vendors and has tested and achieved compatibility with their assistive technologies and devices to achieve optimal and innovative accessibility in communications networks.

- B. Handsets – Describe and present options for at least 3 tiers of IP handsets; basic, advanced and receptionist/operator.

- i. What are the features of your handsets that set them apart from the competition?

All handsets included in the response of this RFP have a high quality full duplex speakerphone, switch pass through port, and fixed keys for common telephony features. If video endpoints are selected, all calls between IP video phones would be native video calls.

- ii. Do you recommend and support 3<sup>rd</sup> party handsets?

3<sup>rd</sup> party SIP handsets have the ability to register with the phone system but the feature set cannot be guaranteed. Ednetics recommends Cisco Unified Call Manager supported handsets for use with this service.

- iii. Our desired setup is to use IP handsets as a pass through network connection for the user's desktop computer. Most handsets could be rolled out with a 100 Megabit computer port but some users will require Gigabit.

All IP phones proposed in this solution have a pass through network port. There are phones included in this proposal with a gigabit capable pass through network port.

- iv. Handset costs will be a significant factor in our determination as to which handset we select as our standard.

Ednetics acknowledges.

- C. Handset network-focused details –

- i. Describe how the VoIP handsets determine the Voice VLAN they should be using. Which method is recommended/preferred: DHCP, LLDP-med, or other?

The handsets negotiate the Voice VLAN by CDP on a Cisco Switching platform. On an HP switching platform, LLDP-MED will be used to negotiate the Voice VLAN.

- ii. What are the power requirements of the recommended handsets?

All handsets proposed require 802.af compliant PoE or an optional power adapter where PoE is not available.

- iii. Describe the IP handsets ability to communicate its capabilities to the PoE switch (for example, LLDP-MED).

CDP is used with Cisco switching to negotiate power, LLDP-MED is used for HP switching.

- iv. Describe how the IP handsets obtain their configuration and any required options.

The phone servers are programmed with the IP handsets MAC address for each phone's settings. When that phone is plugged in on the network it pulls the configuration associated to its MAC address.

- D. Cordless Handsets / Wireless Headsets – We will prefer options that support industry-standard wireless protocols and non-proprietary hardware. What options are available for phone users who prefer a cordless handset or wireless headset?

The phone models proposed with a headset port will work with any standard corded or cordless headset with the RJ11 style connector. Optional models have been listed with support for Bluetooth. Cisco 7925 is a wireless handset that operates on the WLAN. A traditional wireless handset can be plugged into an ATA.

- E. Mobile and Remote Teleworker Access – Describe how your solution supports employees who are working away from their primary workspace, either on campus or off campus and not using the UI network. For example, UI is very interested in learning about how your product integrates with personally owned cell phones, how remote workers outside of the UI network could utilize your solution, etc. How does your solution ensure that related network traffic is secure?

Ednetics Voice comes with a feature called Single Number Reach (SNR). This feature allows for a user's private or University cell phone, alternate number, or any other contact to be associated with a user's directory number. When the directory number is called the SNR number will ring as programmed. This can be set to only ring during business hours. In addition to SNR if a remote worker has a VPN connection to the University network an IP handset can be used just as if they were on campus.

- F. Soft phones - UI does not plan to offer softphone client functionality to our customers as part of this project but need to understand your solution. Tell us about your softphone solution. Describe what it will take to roll out and support soft phone clients in our environment. FYI, our previous informal softphone testing was unsuccessful due to stateful firewall traversal and VLAN issues. Also, describe how your solution provides support for 3rd party softphone client software.

Our softphone product utilizes Cisco Jabber. Cisco Jabber is an instant messaging and collaboration application designed to be installed on a user's workstation. Cisco Jabber is included in our solution at no additional charge.

The Ednetics Voice standard user rate covers the optional use of either a soft phone or a desk phone. If a user requires both a desk phone and a soft phone, an additional charge will apply. See Additional Pricing in Section 6.

- G. Wireless - Voice traffic over WiFi is not a requirement for this project but we are interested in your recommendations for what would be required to support your service on our wireless network. We assume that our current wireless network infrastructure, which does not utilize QoS, is not capable of supporting guaranteed quality voice traffic.

The Cisco 7925 is a wireless handset designed to use the WLAN. If the wireless network is not considered "Voice Grade Wireless" a better solution could be to use the Single Number Reach feature.

- H. Speakerphones - UI currently uses and may continue to deploy high-quality, expensive analog speakerphones in conference rooms and large offices. What are your recommendations regarding speakerphones? For example, would you recommend converting all existing speakerphones to IP, continue to support existing speakerphones via analog gateways, etc.?

Ednetics recommends using our speaker phone option, which is the Cisco 8831. The current analog speakerphones can be supported under the analog user fee with an ATA.

- I. Computer-based Call Control – Describe how your solution allows for computer-based control of IP handsets.  
Computer-based call control can be handled through Cisco Jabber or Microsoft Lync. The users phone can be controlled through Jabber or Lync for answering, transferring, conferencing, etc.

### 3.2.4 SECURITY

The proposed solution must be adequately secured to comply with Federal and State laws and regulations as well as meeting accreditation and University requirements.

- A. Describe how physical access to the data center(s) is controlled?  
Physical access is controlled through locking doors and key card access. Only authorized personnel are permitted in the datacenters. Inside of the datacenters we use locking racks only accessible to those who are a member of the Ednetics Managed Service Team.
- B. What security measures will be taken to protect University data?  
All of our customer data is stored separately. We physically and logically control access into our datacenters.
- C. Describe the written policies, procedures, and methods for ensuring security.  
Ednetics Customer Proprietary Network Information (CPNI) policy is in place and in compliance with FCC standards. This policy requires Ednetics to protect your network information and account information from getting into the wrong hands. In order to do this, Ednetics requires a list of authorized contacts with contact information to be kept on file and to be updated whenever there is a change in contacts. Where logons and passwords are required for web access to Ednetics systems, they are set up via telephone in order to verify the party making the request is authorized. New employees are covered upon hire on the CPNI policy and all Ednetics employees are covered annually, which includes the ramifications of violating that policy. Certification is required from each employee and maintained in their personnel file. It is Ednetics policy that only employees who have a legitimate need to know, have access to a customer's CPNI, however, all employees are covered on the policy whether they have access to the CPNI or not so they will understand the seriousness of protecting customer network and account information.
- D. Explain the proposed solution's response to applicable state and federal laws, including and specifically addressing CALEA compliance, and explain how you maintain compliance with privacy rules & regulations (such as the Privacy Act of 1974, PCI, HIPAA, etc).  
Communications Assistance Law Enforcement Act (CALEA). Cisco Unified Communication Manager is fully capable of meeting the CALEA standards. Ednetics is in full compliance with CALEA standards and the law. Our CALEA System Security and Integrity Policies and Procedures Manual outlines the procedures to follow in case of a request from law enforcement. Ednetics senior employees have been designated as compliance manager and assistant compliance manager(s) to work with law enforcement to legally implement and activate the request. The compliance manager and assistant compliance manager(s) are responsible for making certain all such requests and procedures involved in the request are followed. One of the most important tasks in our compliance is to lock up the results of the interceptions, access to call-identifying information, and traps and traces to maintain the confidentiality of the information obtained.  
  
Privacy Act of 1974. Ednetics provides all information in required reports to governmental agencies at the aggregate level. Ednetics provides no specific customer information in their required reporting to any governmental agencies. If such information were requested of Ednetics from a governmental agency, the requester would need to provide proof of a legal court order delivered by an authorized party with identification. Ednetics has processes in place to handle such requests from governmental agencies with a specific compliance manager to oversee that proper procedures are observed as in the request for interceptions, call-identifying information, and traps and traces above.  
  
Payment Card Industry Data Security Standard. Ednetics is in compliance with this standard.

E. Is the encryption used in this system on either hardware or software phones restricted from use in countries outside the United States?

Yes, the version of Cisco Unified Call Manager we use is Restricted from export outside of the US (this would indicate that if a phone is outside of the US it would not be able to use the encryption mechanism within the Call Manager).

F. Indicate where data centers are located or any place where you store customer data, include any locations outside the United States.

Ednetics maintains datacenters throughout the northwest. Our main points of presence are located in our corporate headquarters in Post Falls, ID and in the Westin Building in Seattle, WA.

G. Do you provide a separate written Service Level Agreement that covers security concerns, risks, and liability coverage? If so provide a sample.

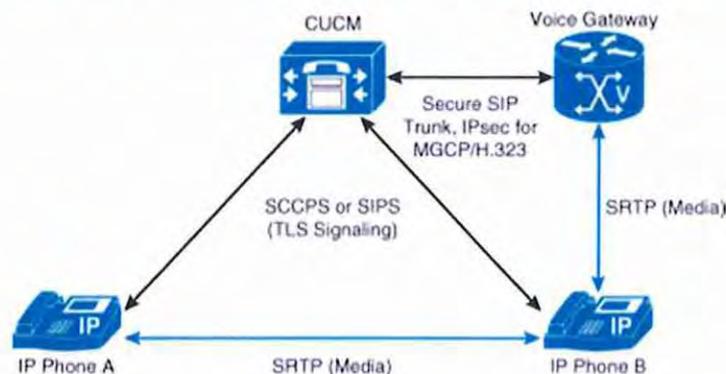
Our Service Level Agreement is included in the Terms and Conditions of the voice contract. The SLA does not specifically cover security concerns but an outage that meets the language of the Terms would be covered.

H. Do you provide encryption of all stored data? Indicate types of encryption and where used.

Call detail records are only accessible through authenticated user access by those who are granted access. These records are transmitted to the servers is sent via Secure File Transfer Protocol (SFTP). System backups are transferred to our backup solution with SFTP and stored encrypted TAR files.

I. Can all media packets (voice, video, IM, etc.) in transport be encrypted? Describe the encryption solutions used.

Cisco Call Manager has two modes of operation. By default it is Non Secure mode meaning all Signaling and Media is Unencrypted. The other mode is known as Mixed Mode, it is referred to as mixed mode because once enabled the Call Manager will be able to support both encrypted and unencrypted communications with endpoints. Once Call Manager is in Mixed mode and the appropriate changes have been made to the endpoints we can see the use of Secure Real-time Transport Protocol (SRTP) and Transport Layer Security (TLS) here:



J. Who has access to any decryption keys and how are they secured?

Encryption and decryption of data is handled between the phone and server. There is no decryption key that a user or administrator has access to.

K. What types of operating systems are running on the servers and how do you secure them from exploits?

The servers associated to this phone system are based on a custom build of Red Hat Linux and security updates are released by Cisco and applied accordingly. Also these systems are not exposed to the internet and on segregated networks from other customers.

- L. What is in place to prevent device-level exploits? This should include any locally installed gateways, data-storage devices, and the telephones (including soft phones).  
Locking Admin interfaces of phones, no phone auto registration, gateways password protected, ACLs, no data storage onsite, soft phones require AD authentication and pre-provisioning of equipment are a part of what is used to prevent device level exploits.
- M. What are the software update mechanisms for installed gateways, data-storage devices, and telephones (including soft phones)? How is the update mechanism resistant to person-in-the-middle attacks? What is the support lifecycle for product enhancements or bug fixes?  
Cisco IOS versions are initiated by an administrator, phone's CTL and ITL must match for a phone to trust it (security by default). Cisco release major upgrades on a semiannual basis, minor patches are released to address bug fixes and other vulnerabilities as identified.
- N. What type of security exists within the applications to prevent abuse and malicious activities?  
Management of the applications is done through a web GUI that is secured with SSL. There are the typical Authentication Parameters that can be set to lockout accounts with too many failed login attempts. There are alerts that can be triggered from RTMT when these failed attempts are happening. We can also set the minimum length of credentials as well expiration of those credentials (for accounts that are local to UCM/CUC) if LDAP integrated those rules will depend on their Active Directory Authentication rules. For voicemail we can force PINs to be a certain length, expire, store previous pins for certain amount of time so they cannot be reused, and prevent trivial PINs from being used.
- O. What security measures are in place to provide secure access to authorized University staff that need to access the system's management tools?  
If Active Directory integrated, a user's account may have roles associated to it for administration of the phone system.
- P. How do you protect the services from standard IP vulnerabilities, including person-in-the-middle and denial-of-service attacks?  
This service is not exposed to the Internet; we segregate customer networks and individual customer voice clusters.
- Q. What are the firewall traversal requirements (applications, ports and protocols) for the service?  
Ednetics Voice does not traverse the Internet and is delivered over a private circuit to the customer premise so no firewall traversal is required. If University policy dictates this traffic passing through a firewall, the list of ports and protocols will be provided.
- R. Explain the frequency of third party audits of the systems and processes of the proposed solution. If possible, please include the results of the latest SOC 2 type 2 audit.  
Ednetics complies with all of the FCC and State regulations for a CLEC. Ednetics will provide documentation as needed upon request.
- S. For cloud services, please provide the assessment results of a Cloud Security Alliance Cloud Controls Matrix version 3.0 or better, or equivalent documentation.  
Ednetics Voice is not an Internet based Cloud service. All connections to and from the customer sites are private and an extension of the customer's network.
- T. Describe the electronic discovery and retention capabilities of the proposed solution including user or centrally instigated voice mail retention policies and the ability to administratively extract voice mail messages (for example, as part of a Public Records request facilitated by the University).  
Voice mail retention policy is customizable. Voice messages may be access through a web browser or an email inbox.
- U. Describe the logging capabilities of the service for both administrative changes and normal use.  
Auditing is built into the application. The system also supports exporting syslog.

- V. Describe the retention time available for system logs and call detail records and how are they made available for integration into external logging facilities (Syslog, SIEM tools) or for export.

Call Detail Records (CDRs) are retained for 7 years per FCC regulation. CDRs are available through our User portal or through SFTP from Call manager for customer use. System logs are maintained by Ednetics and retained for 3 months.

**3.2.5 SYSTEM SUPPORT / MAINTENANCE**

The University support staff's goal is to provide superior customer service to the service users. UI's team will best be able to meet this goal by working in a collaborative and cohesive partnership with all parties involved in delivering the proposed service. Part of our excellent customer service strategy is being able to give timely, informative, and thorough messages to service users. It will be vital to our success that all available information be shared between UI and the service providers as soon as it is known.

The service providers must be willing to work with open-lines of communication and deliver a responsive, caring attitude in their customer service. Proactive, meaningful communications and easily understood information is critical to our customer's satisfaction.

UI is new to supporting UCaaS and the Proposer is invited to offer suggestions on best practices for organizing and developing a support function for UCaaS at UI.

The University requires:

- A. A clear understanding of the responsibilities of the service(s) providers and the University  
Acknowledged
- B. Documented accountabilities of all companies involved in delivering the service(s)  
Acknowledged
- C. Collaborative, cohesive, and timely responses from all service(s) providers  
Acknowledged
- D. On demand status information that is current and meaningful  
Acknowledged
- E. Open lines of communication and freely flowing information in both directions  
Acknowledged
- F. Scheduled reports delivered by Proposer to the University showing Service Level Agreements are being fulfilled  
Acknowledged

**3.2.5.1 Monitoring and Notifications**

The ideal solution will include monitoring and notifications alerting University support staff of service issues upon start of an event.

- A. Describe your support and troubleshooting process, including expectations of University.  
We stand behind our services by providing ongoing support through our dedicated Support Desk. This team exists to provide excellent responsiveness, technical support and repair services to our customers. This group enforces the Service Level Agreement (SLA) requirements for our support agreements. We use an enterprise class ticket tracking system to ensure that each issue is accounted for from inception to resolution. This group is trained on the troubleshooting and the resolution of common issues for all of the solutions that Ednetics offers. In addition, the Support Team uses internal paths of escalation including access to our specialized teams and our business partners (such as Cisco Systems, Microsoft, Exacq, etc.).



- G. Describe how you monitor call quality. For example, distracting noise, echo, pops, delays, etc.

We monitor all calls placed on the system using Netflow. This allows us to see latency, packet loss, jitter, and other items associated with poor call quality. Cisco Call Manager also records the Mean Opinion Score (MOS), which is a metric for measuring call quality, into the Call Detail Records.

### 3.2.5.2 Web-based Interface for System/Account Administration

The ideal solution would provide a GUI interface for administration of user-level telephony configurations.

- A. Describe your philosophy and approach with customers that prefer to take a selective but active role in the management and maintenance of their telephone environment.

We offer full administrative access to the phone system for the University support staff. We also offer full support of Moves, Adds, and Changes through our Support Desk. This allows our customers to customize their management experience for their phone system. At any time during the contract the roles and responsibilities can be adjusted to suit the University's needs.

- B. Describe what interface(s) the proposed service will provide the University for performing administrative tasks. For example, building and modifying station programming, call routing rules, user groups, report generation, etc.

The University will have full administrative access to the web interfaces used to maintain Cisco Call Manager, Unity Connection, Emergency Responder, and Cisco Jabber.

- C. Describe how the proposed service supports tiered access permissions for administrators, site coordinators, users, etc.

The interfaces are LDAP authenticated with the user's credentials. Permissions are assigned based on the user for the level of access granted (administrator vs end user).

- D. Describe what the proposed service offers to handle preprogramming of tasks and which types of tasks can be scheduled to execute later (typically during off-hours).

The applications have inactive partitions that are used to stage upgrades and patches. A reboot to switch to the updated version is then scheduled for the prearranged maintenance window.

- E. Are any other management tools provided, such as online access to billing, usage reports, CDR exports, APIs, etc.? Describe the portals available to obtain such information.

Ednetics has developed a custom Portal designed to give administrators access to these items. Since this feature is maintained by Ednetics we are able to incorporate user requests into the interface.

Example of Ednetics Portal:



### 3.2.5.3 Change Management/Trouble Tickets

- A. Describe what the proposed service offers for submitting and managing University and Proposer-generated change requests (MACDs), service requests, and trouble tickets.

Requests may be made through our support line, email to our support team, or through our admin Portal.

- B. Describe how the Proposer will communicate and track requests for support from the University for Proposer's on-site equipment.

Maintenance notifications will be emailed out to University staff when routine maintenance is required. If there is an outage due to onsite equipment, outage notifications will be communicated.

- C. Describe the capabilities of the interface or supporting system for escalation routing and notification rules.

Our support desk has automatic escalations based on the case severity and urgency. An email request can also be used to escalate a support ticket.

- D. Describe any API's you have for third party software. For example, problem ticket systems, systems event logging, other customer-owned software, etc.

N/A

### 3.2.5.4 Roles / Responsibilities / Accountabilities

The University of Idaho has locations across the state at urban and rural sites that can make support challenging. Further challenges lie in UI's newness in supporting a UCaaS solution. As stated above, our goal is to have superior customer service and to that end it will be critical to have smooth transitions in support and a clear understanding of how the Proposer's staff and UI support staff will collaborate across points of demarcation.

To understand the expectations for support between the UI support staff and the support outlined in the proposed service, the Proposer should describe and be as thorough as possible in explaining their roles, responsibilities, and accountabilities as well as the Proposer's expectations of UI staff included in the proposed service offering.

- A. Following initial implementation, we anticipate Proposer support staff may be responsible for:

- i. Non-intrusive monitoring of system status end-to-end.
- ii. Notifying University support staff of system status changes, planned updates/changes.
- iii. Receiving and acting upon MACD requests.
- iv. Engineering and design for future deployments.
- v. Troubleshooting and advanced diagnostics.
- vi. Providing training and documentation for trainers, support staff and users.
- vii. Service responses as identified in the Service Level Agreement.

Ednetics acknowledges and will comply.

- B. Following initial implementation, we anticipate University support staff may be responsible for:

- i. University on-premises LAN and WAN design, maintenance, and support.
- ii. Wiring from on-premises closets to service end-point user devices.
- iii. Delivery of end-point user devices from local University storage to user locations.
- iv. Initial provisioning, device moves, minor configuration changes, first-line support.
- v. Communications with UI customers.
- vi. On-premises basic troubleshooting/replacement of user end-point devices.
- vii. On-premises troubleshooting and repair of device connectivity and LAN configurations.
- viii. On-premise user training/documentation on feature usage and device/service configuration.

Ednetics acknowledges and will comply.

## C. Provide information on the following:

- i. Describe your expectations of the University during end-point deployment management, including tools and processes.

Ednetics will provide worksheets to ensure each users phone, directory number, and MAC address is documented and programmed as intended. The deployment of endpoints will be discussed and coordinated with Ednetics Project Management and University staff. University staff will be responsible for placement of the endpoint at the intended location. Ednetics will provide the process we use for endpoint deployment to the University to use as they see fit. Endpoint deployment includes physical placement, patching from the device to wall to switch port, verify IP address is from the correct DHCP pool.

As part of handset staging Ednetics will require customer-populated worksheets with the required fields for system programming. The process and worksheets will be shared during the project phase.

If the University chooses to have Ednetics manage the end-point deployment management, a pricing option has been provided in Section 6.

- ii. Describe how you assist an organization that is new to supporting UCaaS. For example, what roles and how many staff are needed at the University to support the service?

Tier I support is a University responsibility and the number of staff will depend on the University's user needs. Ednetics assists in phone system administration training, support process and escalation, as well as common troubleshooting items. The University will need to provide an authorized user list for access into the administrative console of the system and who has the influence to request changes to the design of the service.

- iii. Describe what your support would include, specifically any support services Proposer will provide above and beyond the stated responsibilities above.

Our support covers all remote Moves, Adds, and Changes (MACs) of the service. We maintain the servers patch levels, firmware, and general maintenance of the system. The University staff will be the onsite component to our support desk when an issue requires on sight troubleshooting for equipment that is not Ednetics owned.

Ednetics also covers all of the system monitoring of the service including monitoring of call quality, system health metrics, and the provider network.

- iv. Define the typical point of demarcation of support provided by University versus Proposer. Describe how we will work together to smoothly provide superior customer service across that boundary.

We define the point of demarcation in our terms and conditions, as anything connected to the University LAN is a University responsibility. Everything upstream from the service demarcation is a responsibility of Ednetics. Our Support Desk will remotely aid University staff in troubleshooting steps as needed for devices on the University LAN. When problem isolation is required we work with our customers in a WebEx conference provided by our Support Team.

### 3.2.5.5 Invoicing

The University currently uploads and compiles the charges from monthly invoicing from multiple telephony providers into Calero's enterprise communications management solution, Pinnacle. Pinnacle contains individual charge detail and associated university accounting information, by telephone number. Pinnacle collates the charges and then feeds account totals into Banner, the university's ERP system. The individual charge detail is contained within Pinnacle for detail report retrieval by university fiscal staff. This process is not expected to change. The ideal solution provides intuitive tools for reconciling discrepancies between Proposer's solution and the University's applications.

The proposed solution must satisfy the following requirements:

- A. Monthly service invoices must be available in two formats:
  - v. A regular invoice format with invoice number, date, account number, current month summary recap (with totals), high-level summary detail (with sub-totals and totals), and a previous activity recap/account recap with beginning, current month activity, and ending balances. This should be an electronic file such as a .pdf file.  
Ednetics acknowledges and will comply.
  - vi. Electronic, downloadable or retrievable files (flat file, .csv, etc.)  
Ednetics acknowledges and will comply.
    - a. Detailed line accounting of each charge by telephone number. This would include all recurring and non-recurring--non-usage charges. These charges should include description and amount of monthly line charges, taxes, support, etc.  
Ednetics acknowledges and will comply.
    - b. Detailed call detail record (CDR) files of toll call usage. The detail must include for each call, the calling number, called number, date of call, location of called number, time of call, duration of call, and amount charged for the call  
Ednetics acknowledges and will comply.

Please provide the following information:

- A. Describe any billing reports that are available through your application. Include what information they provide, for what circumstances they would be useful, and how they are retrieved or viewed.  
Our customer portal has many pre-generated reports for frequently requested items. These reports include toll calls and associated charges, all call details, emergency calls placed, etc. Reports can also be created on demand for specific data.
- B. If UI identifies a need for a report that isn't currently available, describe the process for obtaining that report.  
The user can generate custom reports. These reports can be exported to .pdf or .csv. If the type of information in the custom report is frequently viewed, this can be turned into a pre-generated report through our Support Desk.
- C. Describe how we can access active and inactive records to validate invoicing in-service dates, work order information, etc.  
Records are retained for 7 years per FCC regulation. All records are active and accessible through the customer portal.
- D. Describe your process for invoicing your customers, including the day of the month your invoicing is performed, how your invoice is sent, the invoicing begin and end dates, if service charges are in advance or arrears of the service, etc.  
Invoices are dated on the 1<sup>st</sup> day of the month and are due by the 10<sup>th</sup> of the following month. You would normally receive your invoice before the 10<sup>th</sup> of each month allowing you thirty (30) days to pay. Ednetics bills in advance for Monthly Charges and in arrears for services used in the previous month and not yet invoiced, e.g. a service started after the 1<sup>st</sup> of the month. International long distance calls, if any, are billed in arrears, as would all other usage-based services such as Toll Free, Directory Assistance, etc.

- E. Describe your process for handling invoicing discrepancies, including the contacts to resolve discrepancies, your escalation process, etc.

Invoicing discrepancies begin with a phone call to Customer Service and Billing Inquiries at 877.809.4610. They will direct your call to the proper person to handle your inquiry. Direct contacts for handling invoicing discrepancies and escalations are:

Direct Contact: **Susan Lamb**  
Telecommunications and  
Regulatory Specialist  
208.619.2679

Escalation Contact: **Jenny George**  
Director of Finance and  
Administration  
208.262.2054

- F. Describe your process for requesting and receiving credits, including forms or formats required, deadlines, etc.

Requests for credits may be made to Susan Lamb at 208.619.2679 or via email at [susan.lamb@ednetics.com](mailto:susan.lamb@ednetics.com). Documentation is required with the request. Such documentation may be provided verbally, or as an attachment to an email or both. If you have a form you would prefer to use, we are open to using whatever means is easiest for you to communicate with us. A request for a credit with documentation should be received prior to the end of the month so the credit could be applied to the next invoice.

### 3.2.5.6 Service Level Agreement

The service level agreement (SLA) needs to define the business expectations and working relationship between UI, Proposer, and all parties of the service. It is expected that Proposer will work with UI and the service providers to arrive at a single SLA. The SLA must provide a measurable framework for your service and must provide clarity in items such as the request/event prioritization, an agreed upon level of downtime, support response and resolution times, etc. UI expects a service performance tracking mechanism where the performance of the service is measured and reported.

- A. Proposer must provide a Service Level Agreement (include with the proposal as an attachment). Describe your service level guarantee for all areas of service.

The SLA for our service is included in the Terms and Conditions of the Ednetics Voice Contract.

For example:

- i. System availability
- ii. Latency
- iii. Packet loss
- iv. Jitter
- v. MOS
- vi. Repair/event resolution target (time)
- vii. Alarm response times
- viii. Response time for maintenance (incl. MACD), etc.
- ix. Escalation processes and timeframes
- x. Definition/prioritization of major and minor events and alarms
- xi. Monitoring for carrier local loop
- xii. Call setups per second
- xiii. Security protection of the University data
- xiv. Definition of problem/request priorities and issue escalation
- xv. Frequency of software upgrades
- xvi. Policy for software patches
- xvii. Engineering and technical support for University staff and field technicians
- xviii. Maintaining of local dial-tone survivability

Provide information for the following:

- A. Provide an example of a Service Level Agreement you have used in a similar previous engagement.  
 The SLA for our service is included in the Terms and Conditions of the Ednetics Voice Contract.
- B. Describe your service response procedure, including turn-around times, major/minor event definitions and alarms, service requests, request/event prioritization, etc.  
 These details are covered in our support agreement in Appendix A.
- C. Describe how latency, packet loss, uptime and availability are calculated.  
 These metrics are measured with the Netflow data collected from actual traffic.
- D. Describe your process for calculating/measuring performance degradation and call quality. Describe the level at which degradation is considered an outage/downtime.  
 The Cisco phone system utilizes the Mean Opinion Score as a metric for call quality. There is not a provision in the Terms and Conditions specifically related to call quality. We do take call quality very seriously and will resolve any quality issues as soon as possible. Because call quality can also be impacted by factors on the customer network we cannot consider customer network quality issues for bill credits under the SLA. On our provider links the Netflow data we monitor will indicate if the issue is a provider issue or customer network issue. Under our support agreement we will assist the University as much as possible.
- E. Describe the consequences to Proposer for SLA violations. Describe the process of resolution with potential compensation for SLA violations.  
 The compensation for SLA violations is listed in the terms and conditions of the Ednetics Voice Contract.
- F. Describe what types of performance measuring and monitoring tools are included. Describe those tools and reports to which the University staff will have direct access.  
 We use multiple tools for measuring system health and call quality metrics. University staff will have access to the Real Time Monitor Tool included with the Cisco Call Manager.
- G. Describe your service performance reporting mechanism where the performance of your service is measured and reported.  
 Netflow is what we use for call quality indicators.
- H. University has many urban and rural locations across the state of Idaho and the Proposer should be prepared with options to support their equipment at each University site. Describe your recommendation for providing rapid response to service requests, outages/repairs, and service expansion at our locations.  
 This deployment model is our standard deployment and very commonly supported by Ednetics. Our Support Desk will receive and escalate issues and coordinate outages/repairs 24/7/365.

### 3.2.5.7 Upgrades – Hardware, Software, and Firmware

- A. Describe the process for hardware, software, and firmware (handset) upgrades. For example, frequency of updates, notification process, how interruption of service is avoided, flexibility for individual customers to stay on an older release if needed or preferred, etc.  
 Hardware upgrades are handled by Ednetics as needed. Software updates are handled by Ednetics to address service feature upgrades and to address security vulnerabilities as needed. Firmware updates are also handled by Ednetics to address bug fixes. All of these items will be addressed during a coordinated maintenance window with the University. Firmware versions can be set on a per phone basis, system wide, or both.
- B. Describe your expectations of the University during the process of hardware, software, and firmware upgrades.  
 Ednetics will handle all hardware, software, and firmware upgrades.
- C. Describe how you determine the need for and the process used to patch security vulnerabilities.  
 Because the service is not Internet facing not all security vulnerabilities will affect this service not all security vulnerability patches may be necessary. We evaluate with our team and Cisco the impact and severity of both the vulnerabilities and updates.

- D. Describe how you determine content for future releases. For example, inclusion of customer requests, etc.

Feature requests are welcome and are a part of the decision criteria for upgrades and feature enhancements. Upgrades are included with the service and go through testing prior to being eligible to release to our customers. Customers will be notified and a maintenance window scheduled when the time comes.

- E. Do you allow or support any third-party enhancements to the solution? Describe any limitations.

We do not directly support third-party enhancements not included in the solution. We do allow our customers to integrate third party solutions into their hosted service.

### 3.3 PROTOTYPE SYSTEM FOR TESTING AND EVALUATION

#### 3.3.1 PROTOTYPE BUILD

Proposer must work with UI to build a prototype environment which will be used for comprehensive testing and evaluation of the proposed service's features and functionality.

Ednetics acknowledges and will comply.

##### 3.3.1.1 Prototype Timeframe

Below are the scheduled dates relative to notification, prototyping, and presentations:

- March 13 – Proposals evaluated and finalists selected; Results and notification to all vendors.
- March 16 – Finalists will begin working with UI technical staff to build a functional prototype service.
- March 27 - All prototype build work must be completed.
- March 30 thru April 6 – Finalists will be on-campus for presentations to RFP evaluation team.

##### 3.3.1.2 Prototype Scope

Selected Proposers will be expected to build a prototype UCaaS environment to be used for testing and evaluation by UI's RFP selection team. Although basic testing can be accomplished very simply with a handset connected to your cloud-based service we need you to tell us what is required to test the full functionality and feature set offered by your solution.

- A. The prototype environment will be built in Moscow with only a limited number of handsets needing to be provided to each of our other in-scope locations.

Ednetics acknowledges and will comply.

- B. Provide a description of the full-featured prototype system that you could provide within the 2 weeks provided for the build. Include a list of proposed features and functionality that can and cannot be included in the prototype. For example; E911, onsite equipment, local dial tone, local survivability, Centranet interoperability, analog gateways, trunking, web-based management/support interface, speakerphones, handsets, headsets, etc.

We intend to demo local survivability, analog gateways, trunking, web-based management, speakerphones, handsets and headsets. Due to limitations within the prototype environment the scope may need to adjust.

- C. Propose alternate solutions for testing and evaluation of an important feature or function if it cannot be built into the prototype environment.

Our current plan is to utilize the University LAN & WAN to distribute services to the remote campus locations. In the event this is not possible for the purposes of the prototype we will use alternative network connections such as a VPN for network back haul to Ednetics datacenters.

- D. Describe any general preparatory tasks UI must accomplish prior to the prototype build.

A true representation of the service would require voice routing and QoS within the University LAN and WAN environment. There is a network recommendations document that includes these details and will be shared as part of the project.

### 3.3.1.3 UI Resources

UI has limited technical staff available to provide direct assistance during the prototype build and you must be aware that they may be working with more than one Proposer during this time period.

- A. Describe the type of assistance and number of hours you expect you might need from UI technical staff during the prototype build.

If the network is not prepared for voice, we will need University staff to work with us to prepare the network. The hours required will depend on the amount of work needed to prepare the network.

### 3.3.2 PRESENTATION

During the week of March 30<sup>th</sup> notified Proposer(s) will need to be onsite in Moscow, Idaho for one full day of presentations and discussions with the RFP selection team and other UI technical staff and customers. Your presentation and discussions will include components such as: proposer overview, general service/solution overview, features and functionality overview, service alignment with UI needs, technical/network breakout session, handset and end-user functionality breakout session, support breakout session, etc.

One week before your presentation, UI will provide a specific list of topics, use cases, or scenarios UI would like included in your presentation/discussion.

Ednetics acknowledges and will comply.

## **SECTION 4 - GENERAL**

### **4.1 INDUSTRY POSITION**

Discuss the Proposer and the manufacturer's (if different) position in the telecommunications industry, recent and planned acquisitions, and relative market share with other industry leading UCaaS vendors.

Ednetics is the largest education-focused telecommunications and network solution provider in the Northwest. As a Competitive Local Exchange Carrier (CLEC) we specialize in providing hosted voice, converged network solutions, IP applications, and managed services that address operational needs in education and government settings. Ednetics customers are K-12, higher education and government institutions throughout Washington, Oregon, Idaho and Montana.

Ednetics is headquartered in Post Falls, Idaho with offices in Moscow, Boise and throughout the Northwest. The company employs over 50 engineers and installation technicians, and dedicated support staff. Additionally, Ednetics has a robust contracting and project management office including certified project management professionals (PMP). The Ednetics team shares a client-focused approach and a passion for technology resulting in services and solutions that support the success of our customers.

- Founded in 1997
- Education and government specific telecommunications and network solution provider
- Idaho based company with six offices across the Northwest
- 100+ full-time employees with over 50 engineers and technicians
- 250+ active higher education and K-12 clients
- Invested in large geographic fiber footprint throughout the Northwest

#### **Industry Awards**

The technology sector has repeatedly recognized Ednetics as an innovative, customer-centric company. Ednetics has received multiple industry awards.

- Idaho Technology Council – 2014 Innovative Company of the Year - Finalist
- Cisco 2014 Partner of the Year | US and Canada West
- 2015 CRN Managed Service Provider Elite 150
- 2014 CRN Managed Service Provider Elite 150
- Patriot Award – Office of the Secretary of Defense for Employer Support of the Guard and Reserve

#### **State Contract Participation**

Ednetics has been a Cisco partner since 1998 and holds Cisco state contracts throughout the Northwest. Our strong partnership with Cisco enables us to offer cost-effective, enterprise-level solutions at the highest standards for our clients. A key part of our decision to use Cisco was our ability to assist customers with end-to-end management and support of the entire solution.

- Idaho State WSCA Cisco Contract
- Idaho State WSCA NetApp Contract
- Washington State DIS Cisco Contract
- Washington State WSCA Cisco Contract
- Washington State WLS Contract
- Washington State WSCA NetApp Contract
- Oregon State WSCA Cisco Contract
- Oregon State WSCA NetApp Contract

## EDNETICS VOICE™ ADVANTAGES

Ednetics Voice is a fully managed IP collaboration solution designed specifically for education and government settings. It combines enterprise grade telecommunications service with consultative customer care. Ednetics Voice customers get access to as much or as little system administration as they require.

Backed by the Idaho based award winning Ednetics Team

- First class service implementation by a company formed at the University of Idaho
- Highly responsive local provider, presence in Post Falls, Moscow and Boise
- Implementation includes professional services and support
- Commitment to high customer satisfaction through policy and customer satisfaction surveys

IP Telephony Experience

- 11 years of experience with Cisco Unified Communications
- High level of Cisco certification for Unified Communications
- 32 enterprise Ednetics Voice deployments
- 6,000+ active hardware video endpoints

Features

- Unlimited calls, free domestic long distance
- Video calling and collaborative features
- Maintenance, support and training included
- Dedicated network delivery
- Web based customer Portal
- Ready for integration

### Ednetics Managed Service Strategy and Roadmap

Cisco Unified Communications delivers a platform for greater functionality using the IP network. Leveraging this, Ednetics Voice integrates with advanced applications, including building access control, video security, emergency notification, paging and intercom, and digital signage. Ednetics will continue to focus on integrating helpful applications to the Cisco Unified Communications platform. The company is working to add more advanced collaboration features into Ednetics Voice Solution including integration for Cisco Call Center Express.

- Ednetics Voice – Continued development of integration strategy for Ednetics Voice. Current integrations include building access control, video security, emergency notification, paging and intercom, and digital signage.
- Ednetics Protect – Ongoing development of campus safety strategy, building on integrated campus wide access control, video surveillance, emergency notification, and real time location technologies.
- Ednetics Network – Continued development of wired and wireless network service strategy. Applications for distance learning and media rich classrooms leveraging new trends and technologies including BYOD and interactivity of second screen devices.
- Ednetics Connect – Further investment in data centers and broadening our fiber footprint.
- Ednetics Portal – Continued investment and development of Ednetics Portal including updates and enhancements of user interface and attention to user experience across devices.

Screen capture from Ednetics Portal



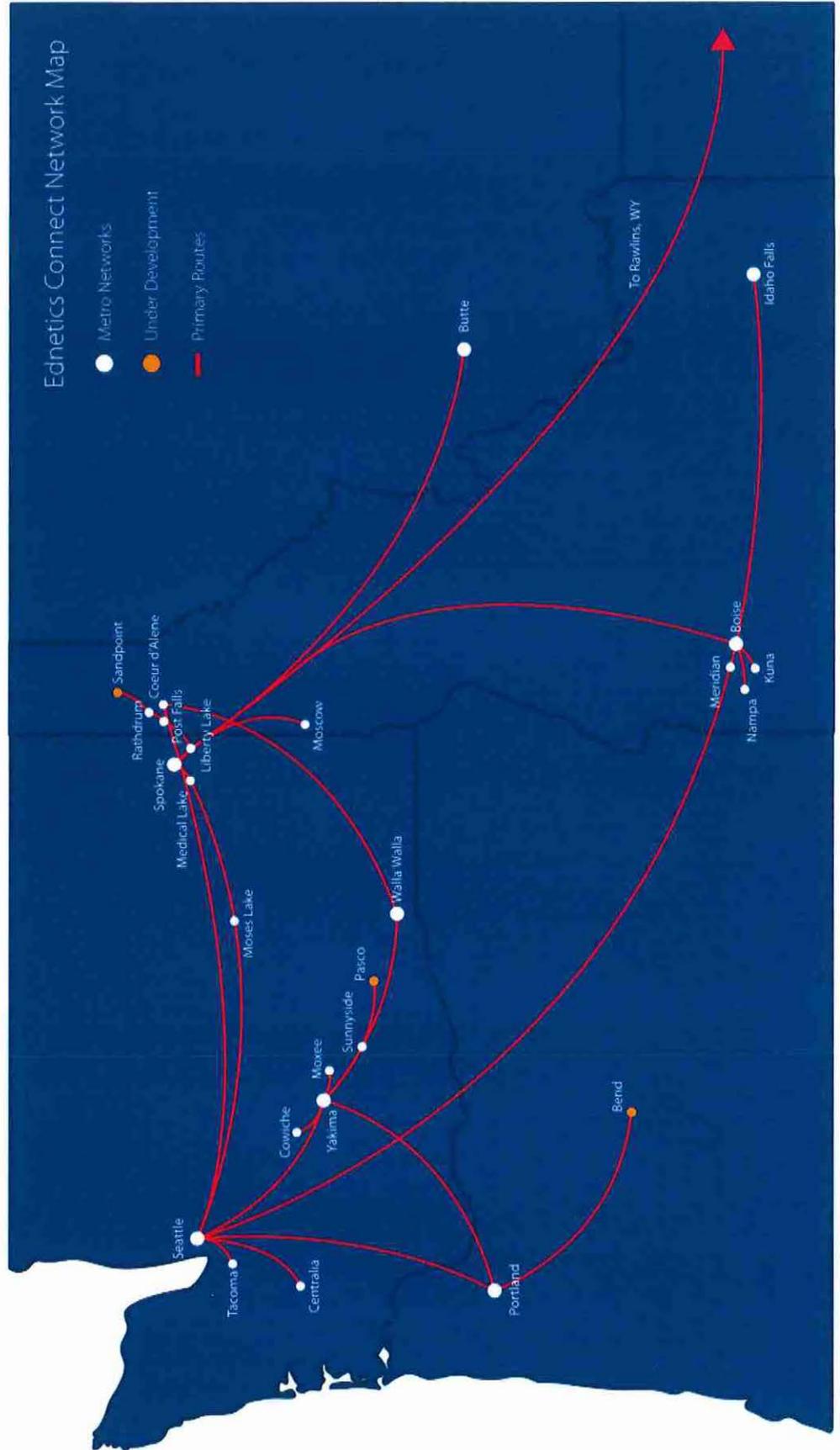
Updates and enhancements of user interface and attention to user experience across devices



Ednetics Main Campus and Data Center in Post Falls Idaho next door to the University of Idaho Research Park



Ednetics Network Map



## CISCO ADVANTAGES

### IP Telephony Experience

Cisco Systems is the most experienced IP telephony vendor. Cisco is the worldwide leader in IP telephony innovations, having pioneered the technology in 1996. The industry continually ranks Cisco highest in the level of maturity and feature strength of their product.

### The Collaboration Leader

#### More customers

- 200,000+ Cisco Collaboration customers worldwide
- More IP endpoints: Cisco has shipped up to five times more IP phones than our nearest competitor
- More than 95% of the Fortune 500® are using Cisco Collaboration

#### More true IP endpoints

- 80 million + Cisco Unified IP phones
- 1 million+ Cisco Telepresence endpoints
- 3 million+ Cisco Unified Contact Center agents

#### More virtual meetings

- 1.2+ billion meeting minutes per month
- 1 million+ Cisco WebEx mobile app downloads from app stores and www.webex.com
- 9 million+ registered hosts

### Financial Strength

#### Market Valuation

- Financial strength, market capitalization of \$150 Billion
- Strong product offerings, successful in our markets
- \$53 billion in cash and short term assets
- No debt

	<b>FY2013</b> <i>ended 07/28/12</i>	<b>FY2012</b> <i>ended 07/28/12</i>	<b>FY2011</b> <i>ended 07/30/11</i>	<b>FY2010</b> <i>ended 07/31/10</i>	<b>FY2009</b> <i>ended 07/25/09</i>
<b>Revenue</b>	\$48.6 billion	\$46.1 billion	\$43.2 billion	\$40 billion	\$36.1 billion
<b>EBIDA*</b>	11,591	10,448	8,194	9,655	7,855
<b>Operating Income</b>	11,196	10,065	7,674	9,164	7,322
<b>Net Change in Cash</b>	(1,874)	2,137	3,081	(1,137)	527
<b>Cash Burn Rate** per month</b>	(156.17)	178.25	256.75	(94.75)	43.92

\* EBIDA is earnings before interest, taxes, depreciation, and amortization, \*\* Cash Burn Rate is usually expressed in terms of cash burned per month, but can be expressed according to any time period.

Below is a 10 year stock chart comparison of Cisco and other publicly traded companies that offer enterprise voice solutions.



Below is Gartner's "magic quadrant" for corporate telephony solutions.



Figure 1. Magic Quadrant for Corporate Telephony  
Source: Gartner, October 2014

## 4.2 LONG-TERM ROAD MAP

Describe the announced enhancements, the planned offerings, and the long-term road map of the proposed product line.

### Ongoing Enhancements to Ednetics Voice

Ednetics is strongly committed to the continued growth and development of Ednetics Voice. The company will continue to invest in geographically diverse data centers and a growing private delivery network across the Northwest.

### Commitment to Integration

Ednetics Voice uses open architecture for future integrations and is currently ready for integration with physical security. The company is committed to the continued development and investment in integrated applications that support the education community.

### Conga™

Future plans for Ednetics Voice include full integration into the Conga, a unified architecture for managed service delivery. The entire Ednetics Managed Service portfolio will be integrated into the Conga architecture.

### Cisco Ongoing enhancements to Collaboration

Cisco has made an ongoing commitment to creating a user experience that is highly supportive of meaningful collaboration. By creating a user experience that has the same look and feel across devices and platforms, Cisco is effectively removing roadblocks to better communication. Whether teams are working together on the same campus or collaborating across campuses, Cisco Collaboration user experience delivers.

Enhancement of User Experience – Current and Planned Releases

- New releases of voice/video endpoints
- Greater consistency across user interface from mobile to phone to video endpoint

### Cisco Integration Strategy

Cisco Unified Communications will continue to provide an integrated communications strategy and architecture, helping to deliver IP voice communications, video communication, conferencing, instant messaging, presence and mobility services.

Stronger Integration – Current and Planned Releases

- Stronger integration of smartphones (IOS and Droid) into Call Manager
- The ability to use local address books for placing calls on IP based phones
- Support for Microsoft Lync

Greater consistency across user interface from mobile to phone to video endpoint:



### 4.3 HIGHER EDUCATION CUSTOMER BASE

#### 4.3.1 PRODUCT USE

Provide examples where the proposed manufacturer's product is the primary UCaaS solution for higher education clients.

WSU Vancouver:

Ednetics initially installed an on premise Cisco Unified Communications system. More recently, we transitioned their on premise UC system to a managed service based system. Today, Ednetics is responsible for the tier two support of their system, which includes:

- Single Inbox integration with Microsoft Exchange
- Integration with Active Directory
- E911 services with automatic zone lookup for phone location identification based on Cisco Emergency Responder
- Advanced auto attendant features for student registration

WSU Puyallup:

Ednetics provides a hosted solution for the Puyallup Research Center. We deliver dial tone over a private circuit and a full complement of unified communications services including:

- Video Calling
- Single Inbox integration with Microsoft Exchange
- Integration with Active Directory
- E911 services with automatic zone lookup for phone location identification based on Cisco Emergency Responder
- Advanced auto attendant features for student registration

#### 4.3.2 PROPOSER'S EXPERIENCE

Provide examples of Proposer's experience with the UCaaS solutions for higher education clients.

Ednetics has a long history of providing Unified Communications solutions for higher education. Our installations and integrations include Everett Community College, Edmonds Community College, Washington State University (West Campus, Prosser, Tree Fruit Research Center, Vancouver Campus, and Puyallup Agriculture Research Center), North Idaho College, and Western Washington University. We also provide our Ednetics Voice services to K-12 campuses in the Northwest with similar communication needs and scale to higher education. In all cases, our customers rely on our offering for their entire unified communications requirements.

## **SECTION 5 - IMPLEMENTATION / TRAINING**

The University's goal is a smooth and seamless statewide implementation of the new telephone system using project controls, tools, and appropriate resources.

The Proposer should base their Statement of Work on the following assumptions.

- The University cabling infrastructure, premise wiring and data connectivity to required equipment is installed, tested and capable of supporting IP traffic prior to implementation.
- The University resources assigned to the implementation project are available to complete project tasks on a timely basis.

### **5.1 STATEMENT OF WORK (SOW)**

Proposer is responsible for and must include project controls and processes that will ensure a smooth implementation. Clearly outline the Proposer's methodology that supports implementation.

Except as otherwise specifically provided in the Statement of Work (SOW), Proposer will design, develop, and deliver a fully operable, comprehensive, integrated telephony solution which meets all of the requirements set forth in the RFP and this SOW, for the monthly service pricing set forth in the Contract Documents, and will demonstrate such solution for acceptance by the University as more fully set forth in this SOW. Costs associated must include all supervision, labor, materials, equipment, and testing instrumentation required for the work associated with the implementation project, as well as any overtime that may occur.

### **5.2 SOW TEMPLATE**

The SOW is attached as a template for responding Proposers to create a proposed SOW for this implementation project. It is intended to demonstrate the minimum requirements and the preferred level of project detail to be included in the submission.

Use this template to write an SOW appropriate for this project and provide applicable pricing. The Proposer should customize this template as necessary to ensure it is a suitable SOW for the delivery of their services. The Proposer's SOW response, including any modifications agreed to by the parties, will become the core element of any subsequent contract.

### **5.3 PROJECT MANAGEMENT**

Proposer is responsible for comprehensive project management services that include the ability to define and offer what are considered industry best practices for the implementation of a hosted solution of this scope, and address the expectations of both the Proposer and the University, including but not limited to the following:

Project Management Approach - Proposer must address the following:

- A. Risk management
- B. Issues management
- C. Financial management
- D. Change control

#### **5.3.1 DETAILED PROJECT PLAN/SCHEDULE**

Proposer Project Manager will be expected to provide a detailed Project Plan/Schedule, subject to approval by the University, which documents all activities and timelines associated with the project including, but not limited to:

- 5.3.1.1 Dates and responsibilities for the coordination tasks relative to pre-installation, installation, and post-installation.
- 5.3.1.2 Detailing and documenting of University requirements.
- 5.3.1.3 Services ordered, including any required onsite equipment.
- 5.3.1.4 Equipment received.
- 5.3.1.5 Network readiness assessment (if required).
- 5.3.1.6 Network and services coordination.
- 5.3.1.7 Solution design and configuration.
- 5.3.1.8 On-site training – timelines for system administration and end user training.
- 5.3.1.9 On-site installation of any required equipment.
- 5.3.1.10 Testing and acceptance.

5.3.1.11 On-site and remote post implementation support.

## 5.4 PRE-IMPLEMENTATION COORDINATION

### 5.4.1 PROPOSER RESPONSIBILITIES - PRE-INSTALLATION

#### 5.4.1.1 End User and Technical Detailed Requirements/Design

- A. Proposer and the University Project Manager will conduct meetings with departmental representatives and University technical teams as needed.  
Ednetics acknowledges and will comply.
- B. Proposer will identify and document detailed University requirements as determined.  
Ednetics acknowledges and will comply.
- C. Proposer will provide design and implementation plans for University approval.  
Ednetics acknowledges and will comply.

#### 5.4.1.2 Services Pilot

- A. Proposer will work with the University Project Manager to ensure provider services are in place, tested, and available to a designated pilot group prior to implementation.  
Ednetics acknowledges and will comply.

## 5.5 IMPLEMENTATION COORDINATION

### 5.5.1 PROPOSER SHALL BE RESPONSIBLE FOR THE FOLLOWING

- 5.5.1.1 Proposer shall work with the University Project Manager to determine site installation of any required equipment, deployment schedule, cutover plan, and coordination of any required equipment delivery. Cutover work will need to be carefully scheduled and performed with minimal disruption to the University operations.  
Ednetics acknowledges and will comply.
- 5.5.1.2 The Proposer shall assume all responsibility for delivery, installation, and testing of all required equipment and services.  
Ednetics acknowledges and will comply.
- 5.5.1.3 Proposer shall test and verify call handling patterns including announcements and prompts for any auto attendant functionality.  
Ednetics acknowledges and will comply.
- 5.5.1.4 Proposer shall test and verify Disaster Recovery (DR) failover and recovery.  
Ednetics acknowledges and will comply.
- 5.5.1.5 Proposer shall test and verify trunking, standard and alternate call routing and inbound and outbound dial plan.  
Ednetics acknowledges and will comply.
- 5.5.1.6 Proposer shall provide cutover coordination.  
Ednetics acknowledges and will comply.
- 5.5.1.7 Proposer shall provide onsite technical assistance during cutover events throughout the migration schedule.  
Ednetics acknowledges and will comply.
- 5.5.1.8 Proposer Project Manager shall work with the University Project Manager to determine timeline and schedule for migration to new system.  
Ednetics acknowledges and will comply.

## 5.6 POST IMPLEMENTATION

### 5.6.1 PROPOSER REQUIREMENTS INCLUDE THE FOLLOWING

- 5.6.1.1 Proposer shall supply adequate resources for all post-cutover issues including training, knowledge transfer, troubleshooting, and user programming adjustments.  
Ednetics acknowledges and will comply.
- 5.6.1.2 Proposer shall supply a Test and Acceptance document for review and approval by the University.  
Ednetics acknowledges and will comply.
- 5.6.1.3 Proposer shall work with the University resources to conduct and document test acceptance and site sign off.  
Ednetics acknowledges and will comply.

## 5.7 DELIVERABLES

Proposer shall complete and present to UI the following deliverables:

- A. Implementation Statement of Work (SOW)
- B. Implementation Budget
- C. Implementation Schedule/Plan
- D. Detailed User and Technical Requirements
- E. Technical Design Documentation
- F. Equipment Lists and Locations
- G. Implementation Change Management Plan
- H. Issue Tracking and Resolution Plan
- I. Test and Acceptance Form

Ednetics acknowledges and will comply. Please see Appendix A for example documentation.

## 5.8 DOCUMENTATION

Proposer shall provide the following:

- A. Documentation compiled during the course of the project.
- B. Final as-built documentation, including detailed University-specific system configuration settings, end user and administrator profiles, etc.
- C. Description of the ongoing support resources available to the University post installation. For example: knowledge base, website, trouble tickets, user guides, web based training, etc.

Ednetics acknowledges and will comply.

## 5.9 RESOURCES & RESPONSIBILITIES

### 5.9.1 PROPOSER PROJECT MANAGER

- A. Proposer will provide a Project Manager experienced with the proposed solution to serve as the University's single point of contact in all aspects of this engagement including but not limited to scheduling, defining requirements, change control, risk mitigation, escalation, implementation planning, and acceptance.
- B. Proposer will provide a Project Manager who shall work in accordance with, and under the direction of, the University Project Manager to verify design specifications and end user requirements.
- C. Participate in planning meetings, weekly status meetings, weekly conference calls and e-mail communications with the University to discuss the project and coordinate activities.
- D. Maintain the Project Plan/Schedule, track dependencies between Proposer and the University tasks, identify and manage Proposer initiated project risks, and alert both project teams of any timeline slips and their effect on the project's target end date.
- E. Work in partnership with the University's Project Manager to coordinate Proposer tasks with the University's tasks throughout all phases of the project.
- F. Provide on-site project management, technical and user support during cut-over, to include up to 3 days of post-live assistance and project. The Proposer Project Manager will use an organized incident management process to track, document and resolve all identified issues.

Ednetics acknowledges and will comply

### 5.9.2 PROPOSER INTEGRATION RESOURCE

Proposer will provide a resource for integration purposes and any custom configuration that may be required to meet specific needs of the University, including integration with the existing telephony system(s) during all phases of the implementation.

Ednetics acknowledges and will comply.

### 5.9.3 PROPOSER TRAINER(S)

Proposer will provide one or more trainers in order to complete the training requirements described in the Training section below.

Ednetics acknowledges and will comply.

### 5.9.4 PROPOSER PROJECT ENGINEER

Proposer will provide a Project Engineer to be the primary technical resource for delivery of the services proposed herein.

Where multiple platforms or applications are used, the Project Engineer must be fully versed in those components or additional qualified engineers must be available to the project team as required to support the complete solution.

Ednetics acknowledges and will comply.

### 5.9.5 UNIVERSITY PROJECT MANAGER

- A. The University Project Manager will provide overall project direction.
- B. The University will provide an internal Project Manager or designate a Project Manager to represent the University, to work closely with the Proposer project team. The University Project Manager's responsibilities will be to facilitate all communication and meetings between Proposer Project Manager and the University project team, and to ensure that the University is meeting the deadlines for accomplishing any University tasks set forth in the project schedule.
- C. Participate in planning meetings, weekly status meetings, weekly conference calls and e-mail communications with the Proposer to discuss the project and coordinate activities.
- D. Identify the University initiated project risks and manage resolution.
- E. Monitor project budgets, approve billings.
- F. Manage project issues and change control.
- G. Manage project communications with governance bodies.

### 5.9.6 UNIVERSITY SUPPORT RESOURCE(S)

- A. University will provide one or more support resources to participate in training that will prepare them to become onsite support resources (including billing, reporting, etc.)
- B. University Trainer(s)
  - i. University will provide one or more resources to participate in train-the-trainer training session(s) provided by the Proposer to become University onsite user trainers.
- C. University Technical Resource(s)
  - i. The University will provide one or more technical resources to work with the design team with design specifications, data gathering, and compilation of end-user configuration data, required network configuration, and other defined technical requirements.

## 5.10 TRAINING

The University aims to provide a process through which employees acquire the capabilities to understand and smoothly transition to the new system allowing them to effectively perform their jobs with minimal interruption.

Proposer will establish a process to train and deliver training to University users, trainers, and support staff.

Ednetics acknowledges and will comply.

### 5.10.1 PROPOSER EXPECTATIONS

- A. Provide end user, train-the-trainer, and support training at each of the University sites or at agreed-upon regional locations.
- B. Work with the University Project Manager to determine training curriculum and schedule.
- C. Provide users with Quick Reference Guides and access to online resources.
- D. Make available any other training tools deemed advantageous to the ongoing use, training, and support of the proposed systems, including but not limited to access to online resources and continuing education.

Provide information for the following:

1. Describe the knowledge and skills necessary, which cannot be gained from Proposer training, for UI staff to become proficient in onsite support tasks. For example, connectivity, networking, telephony, user configuration, etc.

Our Support Staff is very proficient in working with users with varying technical skills, from beginner to advanced. We will work through any issues that arise that may not be covered in training.

2. Describe how you plan to perform knowledge transfer and specialized training on all elements of the proposed solution to the University's implementation and support teams.

Ednetics will have dedicated training scheduled outside of the project implementation schedule. These trainings follow an outlined script to make sure all topics that are applicable are covered. These include administrative tasks such as Moves, Adds, and Changes (MACs). The training is also recorded for view by those who may have missed the training or require a refresher.

3. Describe your process for training onsite University trainers of the system.

Ednetics will provide comprehensive training for the trainers at each of the project sites. We will cover administrative consoles, provide documentation, and access to online resources.

**SECTION 6 - SOLUTION PRICING**

The University goal is to create a simplified internal billing process. UI would like the service you provide to us, and the service we provide to our customers, to be priced as simply and consistently as possible. We are interested in “bundles” that contain a comprehensive set of service features, including a handset, for a fixed price. We realize that some ala carte pricing for end users may be necessary but want to keep these exceptions to a minimum.

The preferred solution will include user-focused (e.g. - \$X per user) bundles that are provided at an affordable cost with handsets and as many features included as possible. **Please list any additional pricing discounts for an initial contract term of four-years and/or five-years, if applicable.**

- Proposer should provide a response that includes bundled pricing for a basic and an enhanced tier of service. Use your experience from prior customer engagements to suggest bundles that you feel will work best for our environment.
- To make it easier for UI to evaluate multiple RFP responses and to keep the invoice provided to UI by the selected Proposer as simple as possible, your bundle pricing should include as many costs as possible: system and user features, onsite equipment such as gateways and call processors, handsets, support, maintenance, troubleshooting/repair, MACDs, toll-free calling, onsite replacement/expansion IP handset stock, licensing, taxes, fees, administration fees, etc.
- We expect pricing to be equivalent for all in-scope UI locations.

Provide information for the following:

1. Describe services, features, and handsets you provide in each bundle.

The features of the handsets are available in the phone matrix included in Appendix A.

2. Describe available services not included in a bundle. For example, toll calls, audio conferencing, call center functionality, voice to text, Gigabit-capable handsets, network-based fax license, etc.

Toll calls prices are listed in the terms and conditions of the contract in Appendix A. Gigabit capable handsets are included in the phone matrix included in in Appendix A. Voice to Text is listed in the table below. Network based faxing is covered under the analog user fee.

3. Describe any price point breaks, minimal commitments, and limitations/conditions to the proposed pricing model.

This proposal reflects our best price.

**6.1 CONFIGURATION SIZING**

Use the information in the following charts as the basis for your pricing.

**6.1.1 INITIAL QUANTITY TABLE 1 – MOSCOW ESTIMATES**

Main Campus – Moscow, Idaho (3,100 lines)	Quantity	Notes
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	300	Could be lower if a network-based fax solution is available and implemented. Includes 100 speakerphones.
Basic bundle	2,300	
Enhanced bundle	500	
Operator / receptionist	1	
Network fax users	200	

Corded/cordless headsets	350	
Speaker phones (IP-based)	3	For testing only
Mobile / remote user	10	For testing only
Softphone client	5	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	5	This is not in scope, but desired for assessment purposes.

### 6.1.2 INITIAL QUANTITY TABLE 2 – BOISE ESTIMATES

<b>Boise, Idaho (160 lines)</b>	<b>Quantity</b>	<b>Notes</b>
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	16	Could be lower if a network-based fax solution is available and implemented. Includes 8 speakerphones.
Basic bundle	124	
Enhanced bundle	20	
Operator / receptionist	0	
Network fax users	25	
Corded/cordless headsets	30	
Speaker phones (IP-based)	0	
Mobile / remote user	0	
Softphone client	0	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	0	This is not in scope, but desired for assessment purposes.

### 6.1.3 INITIAL QUANTITY TABLE 3 – COEUR D'ALENE ESTIMATES

<b>Coeur d'Alene, Idaho</b>	<b>Quantity</b>	<b>Notes</b>
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	6	Could be lower if a network-based fax solution is available and implemented. Includes 3 speakerphones.
Basic bundle	50	
Enhanced bundle	10	
Operator / receptionist	0	
Network fax users	5	
Corded/cordless headsets	10	

Speaker phones (IP-based)	0	
Mobile / remote user	0	
Softphone client	0	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	0	This is not in scope, but desired for assessment purposes.

#### 6.1.4 INITIAL QUANTITY TABLE 4 – IDAHO FALLS ESTIMATES

Idaho Falls, Idaho	Quantity	Notes
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	9	Could be lower if a network-based fax solution is available and implemented. Includes 4 speakerphones.
Basic bundle	40	
Enhanced bundle	7	
Operator / receptionist	0	
Network fax users	5	
Corded/cordless headsets	10	
Speaker phones (IP-based)	0	
Mobile / remote user	0	
Softphone client	0	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	0	This is not in scope, but desired for assessment purposes.

#### 6.1.5 INITIAL QUANTITY TABLE 4 – POST FALLS ESTIMATES

Post Falls, Idaho	Quantity	Notes
Local trunk/lines for local dial tone, 911, and local survivability	TBD Vendor	
Analog extensions (fax machines and speakerphones)	2	Could be lower if a network-based fax solution is available and implemented. Includes 100 speakerphones.
Basic bundle	6	
Enhanced bundle	0	
Operator / receptionist	0	
Network fax users	1	
Corded/cordless headsets	2	
Speaker phones (IP-based)	0	

**ATTACHMENT 3**

Mobile / remote user	0	
Softphone client	0	This is not in scope, but desired for assessment purposes.
Wireless WiFi handset	0	This is not in scope, but desired for assessment purposes.

## 6.2 PRICING

Use the following charts as formatted to provide pricing quotes. All services proposed shall clearly identify both monthly recurring charges and any one-time installation or non-recurring charges, as outlined in the pricing tables herein.

### 6.2.1 PRICING TABLE 1 – ONE-TIME IMPLEMENTATION CHARGES

List all one-time charges associated with implementation of your solution. Mark "N/A" or "Waived" where appropriate. If there are multiple items for a charge below, list and define each item and its cost separately. List quantities, unit costs, and extended costs. Include, for example, implementation, project management, training, software licensing, equipment, travel, etc.

ONE-TIME CHARGES – Relative to Implementation	QTY	UNIT COST	PER UNIT TYPE (EACH, HOUR, SESSION, YEAR, ETC)	TOTAL COST
<b>Implementation</b>	Project	\$0.00	Voice Systems Solution - all locations	<b>\$0.00</b>
<b>Project Management</b>	Project	\$0.00	Voice Systems Solution - all locations	<b>\$0.00</b>
<b>Training</b>	Project	\$0.00	Train the Trainer Solution - all locations	<b>\$0.00</b>
<b>Optional Handset Installation</b> (*University of Idaho may choose to self-deploy handsets)	3071	\$15.00	Installation of handsets at all locations	<b>\$46,065.00</b>
<b>TOTAL OPTIONAL ONE-TIME CHARGES</b>				<b>\$46,065.00</b>

## 6.2.2 PRICING TABLE 2 - RECURRING CHARGES (MONTHLY SERVICE FEES)

Use the table below to list all recurring monthly charges. List and define each item with a cost separately, including bundles, non-bundled services, any special fees, estimated taxes<sup>1</sup>, surcharges, or regulatory fees. Table below includes examples.

**Note:** All charges not listed separately will be assumed to be included in the cost of the bundled service offering.

### Ednetics Voice – Three-Year Service Contract Option – Monthly Service Contract Pricing

RECURRING CHARGES: MONTHLY SERVICE FEES	QTY	UNIT COST	PER UNIT TYPE (EACH, HOUR, SESSION, YEAR, ETC)	TOTAL COST
<b>Basic IP Phone Solution Bundle</b> Includes Cisco 3905 handset and Ednetics Voice User Rate	2505	\$13.96	Per month cost for 36 months. *Includes: User rate = \$13.00 Phone cost = \$.96	\$34,969.80
<b>Enhanced IP Phone Solution Bundle</b> Includes Cisco 7821 handset and Ednetics Voice User Rate	552	\$15.28	Per month cost for 36 months. *Includes: User rate = \$13.00 Phone cost = \$2.48	\$8,434.56
<b>Premium IP Phone Solution Bundle</b> *Sample Bundle Includes Cisco 7841 handset and Ednetics Voice User Rate.	0	\$16.55	Per month cost for 36 months. *Includes: User rate = \$13.00 Phone cost = \$3.55	\$0
<b>Video Capable IP Phone Solution Bundle</b> *Sample Bundle Includes Cisco 8945 Video Phone and Ednetics Voice User Rate.	0	\$18.10	Per month cost for 36 months. *Includes: User rate = \$13.00 Phone cost = \$5.10	\$0
<b>Operator / Administrator IP Phone Solution Bundle</b> *Sample Bundle Includes Cisco 8851 Phone and Ednetics Voice User Rate.	1	\$18.78	Per month cost for 36 months. *Includes: User rate = \$13.00 Phone cost = \$5.78	\$18.78
<b>IP Conference Phones</b> Includes Cisco 8831 Phone and Ednetics Voice User Rate.	3	\$25.00	Per month cost for 36 months. *Includes: User rate = \$13.00 Phone cost = \$12.00	\$75.00
<b>Softphone / Mobile Phone User – Stand Alone (no hardware IP Phone)</b> No additional fee for Softphone if this is user's primary device	15	\$13.00	Per month cost for 36 months. *Includes: User rate = \$13.00 Phone cost = \$0	\$195.00
<b>Softphone Adjunct</b> In addition to user's primary device (ie. Laptop for travel when you have an IP phone in the office)	0	\$3.00	Per month cost for 36 months. *Includes: User rate = Included Soft phone add = \$3	\$0
<b>7925 WiFi Phone</b> Includes Cisco 7925 Phone, battery charger and Ednetics Voice User Rate	5	\$20.49	Per month cost for 36 months. *Includes: User rate = \$13.00 Phone cost = \$7.49	\$102.45
<b>Audio Conferencing</b> Included in the Ednetics Voice User Rate	Unlimited	\$0.00	NA	\$0.00

<sup>1</sup> The University of Idaho is exempt from Idaho sales taxes and federal excise taxes. Do not include amounts for Idaho sales tax or federal excise tax.

<b>Network Fax / Analog Fax / Analog Speaker Phones</b> Part of the analog user fee. This fee is for any non-IP endpoint. The number of network fax users is dependent on the fax DIDs you have. You can reduce the analog count by removing a fax machine and use a fax DID. <i>Any use of an IP port vs. an analog port will show significant savings.</i>	333	\$25.00	Per month cost for 36 months.	\$8,325
<b>Voice to Text</b> Cisco Speech View Integration		\$.23	Per month cost for 36 months.	\$0.00
<b>Other (specify):</b>				
<b>TOTAL MONTHLY</b>				<b>\$52,120.59</b>

<sup>1</sup> The University of Idaho is exempt from Idaho sales taxes and federal excise taxes. Do not include amounts for Idaho sales tax or federal excise tax.

**Ednetics Voice – Three-Year Service Contract Option – Monthly Service Contract Pricing Explanation**

The above 3-Year Contract Service monthly price is \$13.00 per month, per IP Phone user, for the contract period.

The difference between the proposed Bundles (Basic, Enhanced, Premium and Video) is the IP Phone Model.

The above 3-Year Contract Service is a representative example of all identified phones (3071) at all identified locations.

Ednetics Voice is offered under a flat-rate per-user pricing model, which allows the University of Idaho to select the appropriate handset model desired to match with the user environment. The IP-Phone could be purchased, financed or leased (using a three or five year term).

The Ednetics Voice Bundles include all features of Ednetics Voice regardless of the phone type selected.

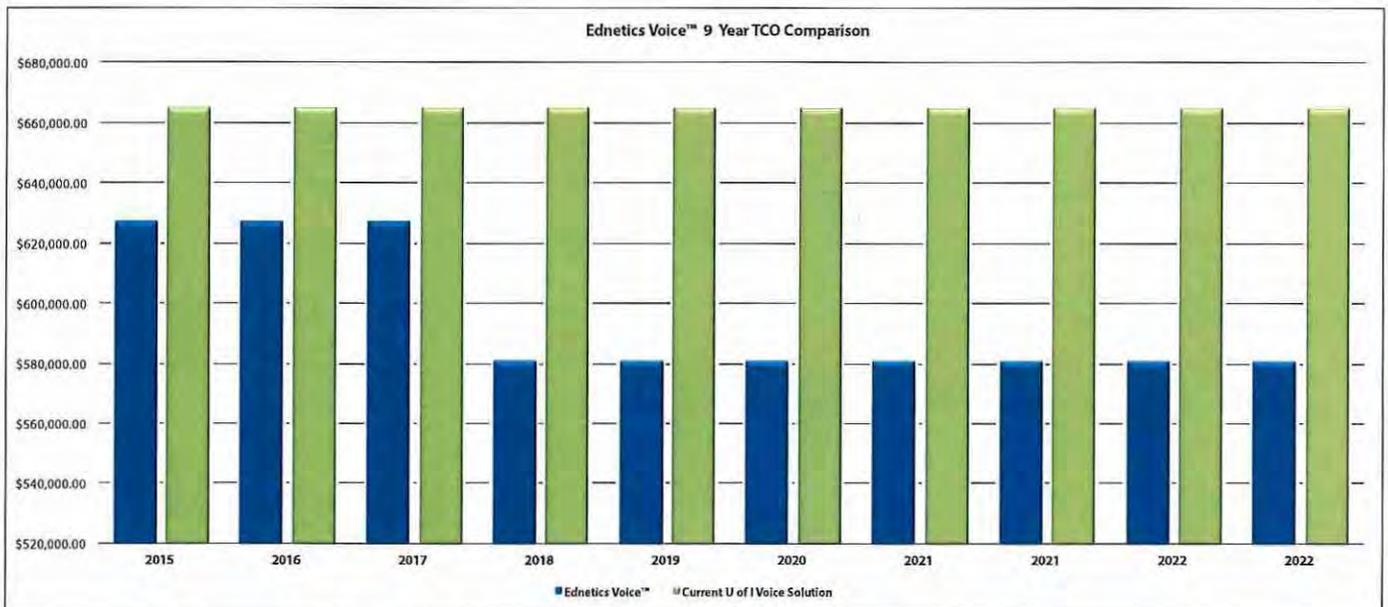
**Ednetics Voice TCO – Nine-Year Timeframe Example – Based on an Initial Three-Year Contract Price**

Ednetics Voice™ | Ednetics Connect™ TCO - 9 Year Service  
 Number of users 3081  
 Number of new handsets 3081

All Costs are Estimated

Current U of I Voice Solution	9 YEAR PERIOD										Total Cost	
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024		
Initial Cost of System	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
PSTN and LD	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 4,722,000.00
Maintenance	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Support	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
System Upgrades	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
FTE	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 1,930,000.00
<b>Total 9 Year Cost</b>	<b>\$ 665,200.00</b>	<b>\$ 6,652,000.00</b>										

Ednetics Voice™	9 YEAR CONTRACT										Total Cost	
	2015	2016	2017	2018	2019	2020	2021	2021	2022	2022		
Handset Costs	\$ 46,416.42	\$ 46,416.42	\$ 46,416.42	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 139,249.25
Ednetics Voice™	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 5,805,360.00
<b>Total 9 Year Cost</b>	<b>\$ 626,952.42</b>	<b>\$ 626,952.42</b>	<b>\$ 626,952.42</b>	<b>\$ 580,536.00</b>	<b>\$ 5,944,609.25</b>							



**Ednetics Voice TCO – Three-Year Timeframe Example**

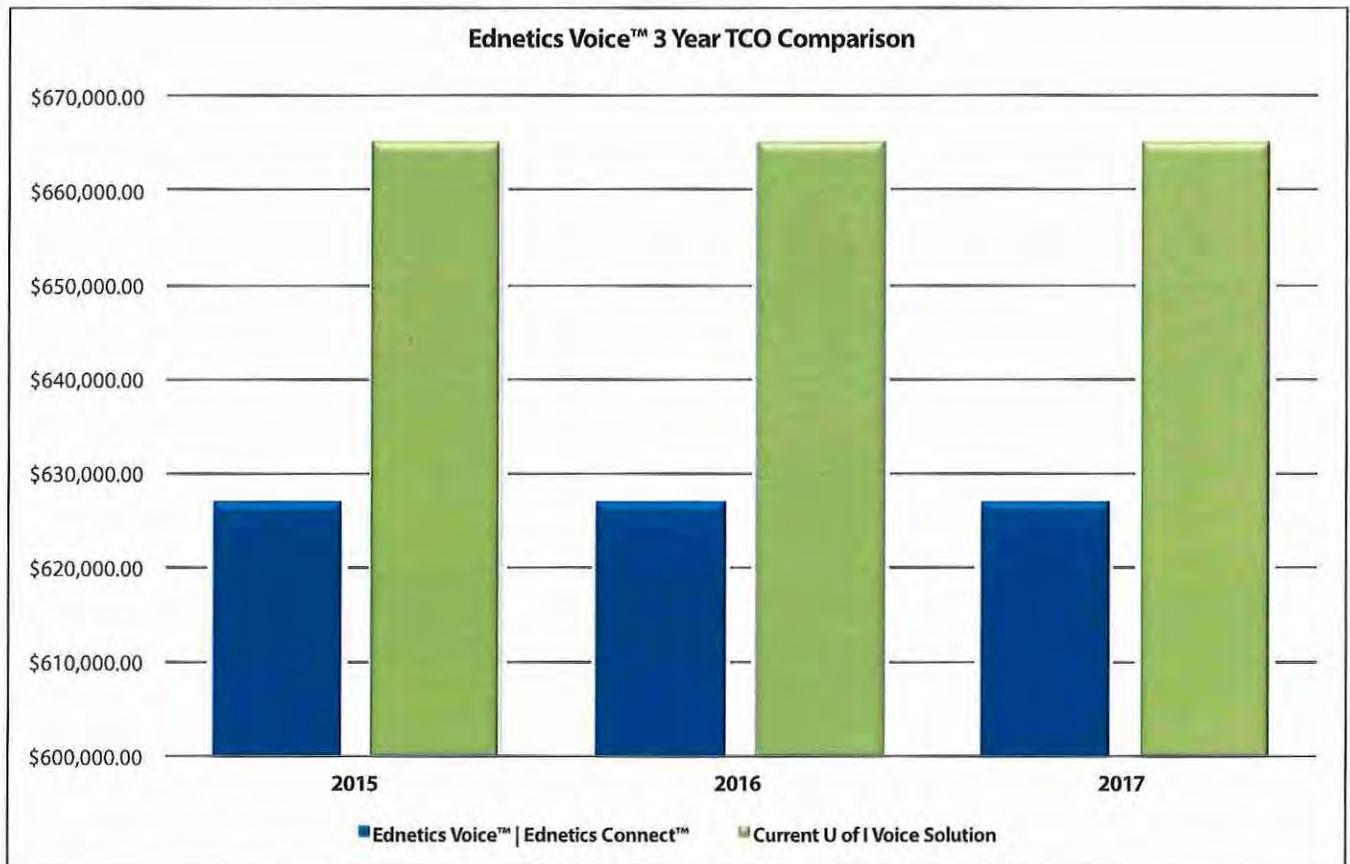
**Ednetics Voice™ | Ednetics Connect™ TCO - 3 Year Service Contract Period**

*All Costs are Estimated*

Number of users 3081  
 Number of new handsets 3081

Current U of I Voice Solution	3 YEAR PERIOD			Total 3 Year Cost
	2015	2016	2017	
Initial Cost of System	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
PSTN and LD	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 1,416,600.00
Maintenance	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Support	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
System Upgrades	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
FTE	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 579,000.00
<b>Total 5 Year Cost</b>	<b>\$ 665,200.00</b>	<b>\$ 665,200.00</b>	<b>\$ 665,200.00</b>	<b>\$ 1,995,600.00</b>

Ednetics Voice™   Ednetics Connect™	3 YEAR CONTRACT			Total 3 Year Cost
	2015	2016	2017	
Handset Costs	\$ 46,416.42	\$ 46,416.42	\$ 46,416.42	\$ 139,249.25
Ednetics Voice™	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 1,741,608.00
Additional Local Gateways (SRST)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total 3 Year Cost</b>	<b>\$ 626,952.42</b>	<b>\$ 626,952.42</b>	<b>\$ 626,952.42</b>	<b>\$ 1,880,857.25</b>



**6.2.3 PRICING TABLE 3 – USAGE BASED CHARGES**

List all usage based charges, along with rates and units. List and define each item with a cost separately. If an item charge is not listed below, it will be assumed that the charge is included in the bundled services amount.

USAGE BASED CHARGES	UNIT COST	PER UNIT TYPE (EACH, HOUR, SESSION, YEAR, ETC)
<b>Moves, Adds, Changes, Deletes</b>	\$0.00	Included in the monthly cost per line. <i>No additional fee applied for the Service Contract Period.</i>
<b>Toll Call Costs (do not include international rates)</b>	\$0.00	Included in the monthly cost per line. <i>No additional fee applied for the Service Contract Period. *Does not include service calls (ie. 411 Directory Assistance)</i>
<b>Other (specify):</b>	N/A	

**6.2.4 ADDITIONAL PRICING**

Provide additional information on the following options:

1. volume pricing on conferencing speaker phones, headsets, and accessories

All Pricing for Phones, Headsets & Accessories is representative of our volume price discounts. Ednetics is offering our proposal based on a term of three (3) years, commencing upon the date of execution by the university. We are prepared to extend this proposal by three (3), two-year increments for a total of six (6) additional years.

2. special offers, financing, promotions, or discounts for trading-in any legacy equipment

All Pricing is reflective of combination of special offers, financing, promotions and discounts.

Ednetics recommends eliminating as many analog station endpoints as possible for systems uniformity & overall solution flexibility. For example, the service price for a new IP Conference Phone is the same price as the service price for an Analog Station port. This example includes the price of the new IP Conference Phone, which would be able to be utilized at any location that has U of I campus data network access – in contrast, the analog port service is only of value to the single device connected to the port & does not include a new analog Conference Phone.

3. minimums, volume or threshold levels required for additional price discounts

The Service Minimums are identified within the included proposal contract documentation. The proposed 3-Year Contract provides the University the assurance of a consistent service price for a 3-9 Year period depending on contract renewals.

**Ednetics Voice – Five-Year Service Contract Option – Monthly Service Contract Pricing**

<b>RECURRING CHARGES: MONTHLY SERVICE FEES</b>	<b>QTY</b>	<b>UNIT COST</b>	<b>PER UNIT TYPE (EACH, HOUR, SESSION, YEAR, ETC)</b>	<b>TOTAL COST</b>
<b>Basic IP Phone Solution Bundle</b> Includes Cisco 3905 handset and Ednetics Voice User Rate	2505	\$13.58	Per month cost for 60 months. *Includes: User rate = \$13.00 Phone cost = \$.58	\$34,017.90
<b>Enhanced IP Phone Solution Bundle</b> Includes Cisco 7821 handset and Ednetics Voice User Rate	552	\$14.49	Per month cost for 60 months. *Includes: User rate = \$13.00 Phone cost = \$1.49	\$7,998.48
<b>Premium IP Phone Solution Bundle</b> *Sample Bundle Includes Cisco 7841 handset and Ednetics Voice User Rate.	0	\$15.13	Per month cost for 60 months. *Includes: User rate = \$13.00 Phone cost = \$2.13	\$0
<b>Video Capable IP Phone Solution Bundle</b> *Sample Bundle Includes Cisco 8945 Video Phone and Ednetics Voice User Rate.	0	\$16.06	Per month cost for 60 months. *Includes: User rate = \$13.00 Phone cost = \$3.06	\$0
<b>Operator / Administrator IP Phone Solution Bundle</b> *Sample Bundle -Includes Cisco 8851 Phone and Ednetics Voice User Rate.	1	\$16.47	Per month cost for 60 months. *Includes: User rate = \$13.00 Phone cost = \$3.47	\$16.47
<b>IP Conference Phones</b> Includes Cisco 8831 Phone and Ednetics Voice User Rate.	3	\$21.14	Per month cost for 60 months. *Includes: User rate = \$13.00 Phone cost = \$8.14	\$63.42
<b>Softphone / Mobile Phone User – Stand Alone (no hardware IP Phone)</b> No additional fee for Softphone if this is user's primary device	15	\$13.00	Per month cost for 60 months. *Includes: User rate = \$13.00 Phone cost = \$0	\$195.00
<b>Softphone Adjunct</b> In addition to user's primary device (ie. Laptop for travel when you have an IP phone in the office)	0	\$3.00	Per month cost for 60 months. *Includes: User rate = Included Soft phone add = \$3	\$0
<b>7925 WiFi Phone</b> Includes Cisco 7925 Phone, battery charger and Ednetics Voice User Rate	5	\$17.50	Per month cost for 60 months. *Includes: User rate = \$13.00 Phone cost = \$4.50	\$87.50
<b>Audio Conferencing</b> Included in the Ednetics Voice User Rate	Unlimited	\$0.00	NA	\$0.00
<b>Network Fax / Analog Fax / Analog Speaker Phones</b> Part of the analog user fee. This fee is for any non-IP endpoint. The number of network fax users is dependent on the fax DIDs you have. You can reduce the analog count by removing a fax machine and use a fax DID. Any use of an IP port vs. an analog port will show significant savings.	333	\$25.00	Per month cost for 60 months.	\$8,325
<b>Voice to Text</b> Cisco Speech View Integration		\$.23	Per month cost for 60 months.	\$0.00
<b>Other (specify):</b>				
<b>TOTAL MONTHLY</b>				<b>\$50,718.72</b>

**Ednetics Voice – Five-Year Service Contract Option – Monthly Service Contract Pricing Explanation**

The above 5-Year Contract Service monthly price is \$13.00 per month, per IP Phone user, for the contract period.

The difference between the proposed Bundles (Basic, Enhanced, Premium and Video) is specifically the IP Phone Model.

The above 5-Year Contract Service is a representative example of all identified phones (3081) at all identified locations.

This Per-user pricing model allows the University to select the appropriate handset model desired to match with the user environment. The IP-Phone could be purchased, financed or leased (using a three or five year term).

The Ednetics Voice Bundles include all features of Ednetics Voice regardless of the phone type selected.

Ednetics Voice TCO – Nine-Year Timeframe Example – Based on an Initial Five-Year Contract Price

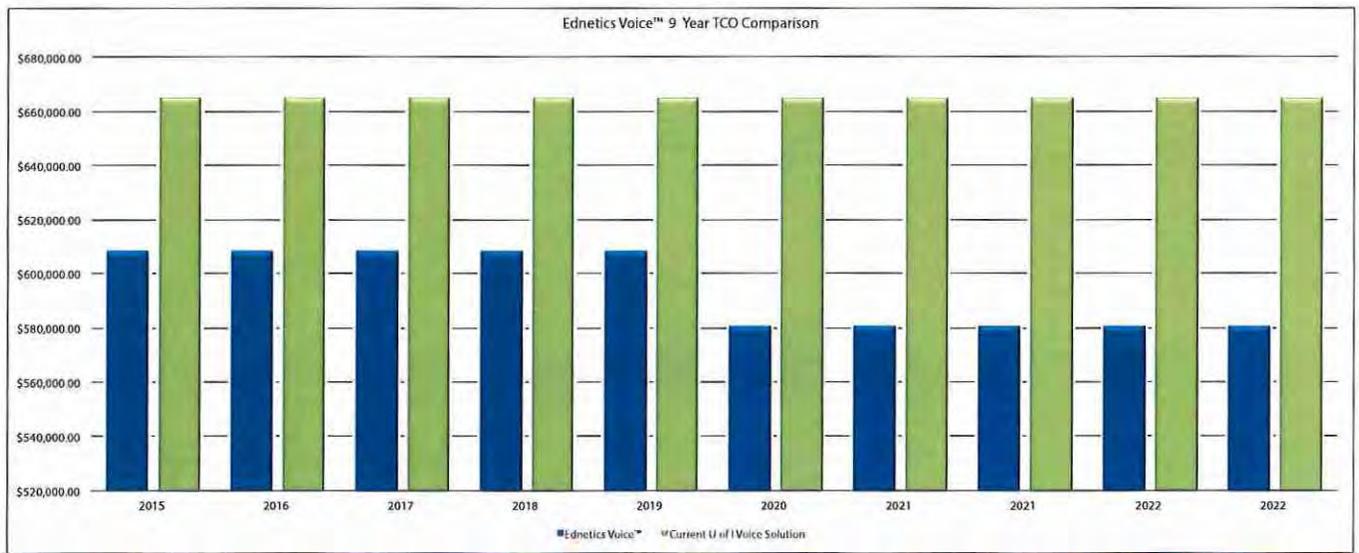
Ednetics Voice™|Ednetics Connect™ - 9 Year Service

All Costs are Estimated

Number of users 3081  
 Number of new handsets 3081

Current U of I Voice Solution	9 YEAR CONTRACT										Total Cost		
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024			
Initial Cost of System	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 4,722,000.00
PSTN and LD	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 4,722,000.00
Maintenance	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Support	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
System Upgrades	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
FTE	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 1,930,000.00
<b>Total 9 Year Cost</b>	<b>\$ 665,200.00</b>	<b>\$ 6,652,000.00</b>											

Ednetics Voice™	9 YEAR CONTRACT										Total Cost		
	2015	2016	2017	2018	2019	2020	2021	2021	2022	2022			
Handset Costs	\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 139,249.25
Ednetics Voice™	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 5,805,360.00
<b>Total 9 Year Cost</b>	<b>\$ 608,385.85</b>	<b>\$ 580,536.00</b>	<b>\$ 5,944,609.25</b>										



**Ednetics Voice TCO – Five-Year Timeframe Example**

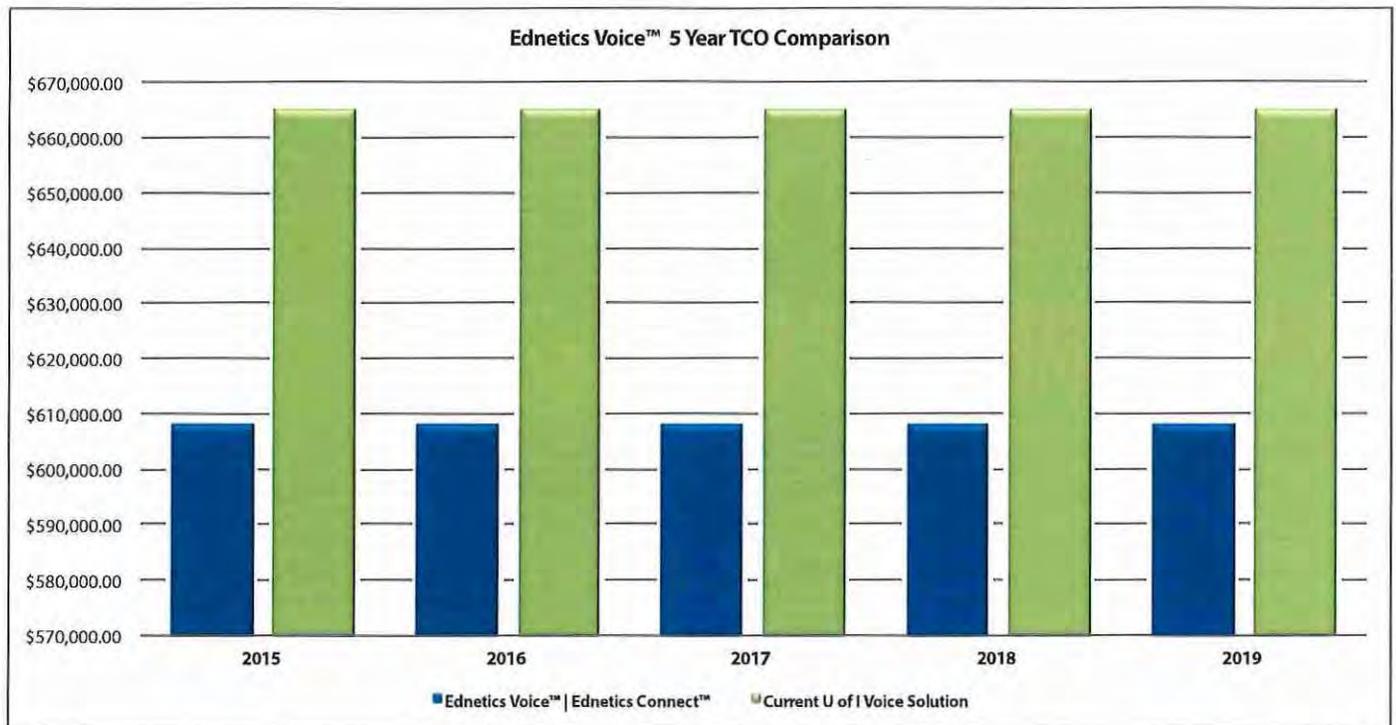
**Ednetics Voice™ | Ednetics Connect™ TCO - 5 Year Service Contract Period**

*All Costs are Estimated*

Number of users **3081**  
 Number of new handsets **3081**

Current U of I Voice Solution	5 YEAR PERIOD					Total 5 Year Cost
	2015	2016	2017	2018	2019	
Initial Cost of System	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
PSTN and LD	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 2,361,000.00
Maintenance	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Support	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
System Upgrades	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
FTE	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 965,000.00
<b>Total 5 Year Cost</b>	<b>\$ 665,200.00</b>	<b>\$ 3,326,000.00</b>				

Ednetics Voice™   Ednetics Connect™		5 YEAR CONTRACT					Total 5 Year Cost
		2015	2016	2017	2018	2019	
Handset Costs		\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 139,249.25
Ednetics Voice™		\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 580,536.00	\$ 2,902,680.00
Additional Local Gateways (SRST)		\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total 5 Year Cost</b>		<b>\$ 608,385.85</b>	<b>\$ 3,041,929.25</b>				





Phone Handset Detail

PHONE MODEL	Cisco 3905	Cisco 7821	Cisco 7841	Cisco 8851	Cisco 8945	Cisco 9951	Cisco 9951 Video	Cisco CKEM	Cisco 8831
FEATURES									
Purchase Price	\$29.70	\$76.50	\$109.50	\$178.50	\$157.50	\$231.00	\$295.50	141.00	\$418.50
Price per month for 3 years	\$0.96	\$2.48	\$3.55	\$5.78	\$5.10	\$7.49	\$9.58	\$4.57	\$12.00
Price per month for 5 years	\$0.58	\$1.49	\$2.13	\$3.47	\$3.06	\$4.49	\$5.75	2.74	\$8.14
Number of phone lines	1	2	4	5	4	5	5		1
Switch port type	10/100	10/100	10/100/1000	10/100/1000	10/100/1000	10/100/1000	10/100/1000		10/100
Bluetooth support				3.0	2.0	2.0	2.0		
Key expansion module support				2					
Cisco unified video camera support							1		
Recommended for classrooms	•	•	•	•	•				
Recommended for office staff		•	•	•	•	•	•		
Recommended for administrators				•	•	•	•		
Recommended for very active communication needs				•		•	•		

\* - Purchase price listed above is valid through July 26, 2015. Price per month is good for twelve months after the date of a signed contract.

**Headset Pricing:**

Plantronics Supra Plus (Part #: HW251N): \$58.40 each

Plantronics Voyager Blue Tooth with Charging Base (Part #: 89880-42): \$79.00 each

**Pricing thresholds:**

We are providing consistent service contract discounts based on the service commitment for three and five years.

## **SECTION 7 - PROCUREMENT PROCESS**

### **7.1 PROPOSER LIST AND QUALIFICATION EVALUATION**

After the established date for receipt of proposals, a listing of Proposers submitting proposals will be prepared, and will be available for public inspection.

Qualifications and proposals submitted by interested Proposers will be reviewed and evaluated based on the evaluation factors set forth in the RFP.

### **7.2 PROPOSAL CLASSIFICATION**

For the purpose of conducting discussions with individual proposers, if required, proposals will initially be classified as:

- A. Potentially Acceptable
- B. Unacceptable

Discussions may be conducted with any or all of the Proposers whose proposals are found acceptable or potentially acceptable. Proposers whose proposals are unacceptable will be notified promptly. The Director of Purchasing will establish procedures and schedules for conducting oral and/or written discussions.

Proposers are advised that the University may award an Agreement on the basis of initial offers received, without discussions; therefore, each initial offer should contain the Proposer's best terms from a cost and technical standpoint.

### **7.3 PROPOSER INVESTIGATION**

The University will make such investigations as it considers necessary to obtain full information on the Proposers selected for discussions, and each Proposer shall cooperate fully in such investigations.

### **7.4 FINAL OFFERS AND AWARD OF AGREEMENT**

Following any discussions with Proposers regarding their technical proposals, alternative approaches, or optional features, a number of the firms may be requested to submit best and final offers. The committee will rank the final Proposers for the project, giving due consideration to the established evaluation criteria. The committee will propose award to the proposal which is found to be most advantageous to the University, based on the factors set forth in the Request for Proposals.

## **SECTION 8 - EVALUATION PROCESS**

### **8.1 GENERAL**

Proposals will be evaluated on how well the proposal meets the needs of the University, as described in the proposer's response to each requirement and the evaluation criteria identified in this RFP. The selected Proposer(s) may or may not be the Proposer(s) proposing the services having the lowest bid price. Proposals will be evaluated on the basis of the criteria specified below.

### **8.2 EVALUATION CRITERIA**

Proposals will be evaluated using the following criteria (not in priority order):

- A. The proposed solution's fit to the University's requirements.
- B. References, experience and expertise.
- C. The total costs of the solution.
- D. The quality of the proposed work plan.
- E. Additional items, including agreement with contract terms.

The University may, during the evaluation process, request from any Proposer additional information which the University deems necessary to determine the Proposer's ability to perform the required services.

### **8.3 EVALUATION PROCESS**

The evaluation of proposals will be undertaken in three stages.

Stage 1: Proposals will be reviewed for completeness and conformity to all University requirements. Proposals not substantially in compliance with such requirements will be identified and, at the sole discretion of the University, may be eliminated from further consideration.

Stage 2: Proposals will be evaluated in detail and preliminarily ranked based on the criteria listed above in this section. Proposals from Proposers determined not to be responsive or qualified will be identified and, at the sole discretion of the University, may be eliminated from further consideration. The evaluators may find it necessary to request additional information from the Proposers. All requests and responses shall be in writing. The University will release a list of all selected finalist Proposers.

Stage 3: The University may require that one or more selected Proposers conduct a presentation and product demonstration for representatives of the University for further evaluation. The University expects each proposer to demonstrate the latest generally available versions of the systems and software that comprise the proposed solution. If, however, a proposer is proposing to install a later (pre-announced) release or an older (previous release) version, this must be clearly communicated and explained in the proposal.

## **SECTION 9 - GENERAL CONTRACTUAL TERMS AND CONDITIONS**

### **9.1 AGREEMENT TERMS AND CONDITIONS**

The submission of a proposal herein constitutes the agreement of any Proposer that any Agreement to be drawn as the result of an award herein shall be prepared by the University and shall include at a minimum, all terms and conditions set forth in this RFP. The submission of a proposal shall further constitute the agreement of each Proposer that it will not insist on the use of standard contract agreements, documents, or forms, and that it waives any demand for the use of its standard agreements. The Agreement between the parties shall consist of, in order of precedence: the agreement document signed by the Parties subsequent to submission of the proposal, and any attachments thereto and incorporations therein, the terms and conditions in the RFP, and the Proposer's response to the RFP.

[Ednetics complies and takes no exceptions to Section 9 – General Contractual Terms and Conditions; Section 10 – Indemnity, Risk of Loss Insurance; Section 11 – General Terms and Conditions; and Exhibit A – Insurance.](#)



# Ednetics Voice

Unified Communications Service

Contract ID EV-ID-Uofi-030315-1

March 3rd, 2015

Julia McIlroy, Director of Contracts and Purchasing

875 Perimeter Drive MS2006  
Moscow, Idaho 83844-2006

**Request for Proposals No. 15-30M Unified Communications as a Service**



## Summary of Services and Charges

Ednetics Voice is a fully managed cloud based service, built on the award winning Cisco Unified Communications platform. It provides full enterprise features with lower initial capital expenditure and a lower total cost of ownership when compared to a traditional on-premise system. Designed specifically for the education community, Ednetics Voice is delivered over a private high performance network offering unparalleled performance and reliability.

Ednetics Voice includes Enhanced 911 services to ensure that emergency personnel will be dispatched to the correct location should the need arise. Service includes end-to-end monitoring by highly trained and certified Ednetics support desk personnel. Ednetics Voice also includes all of the back end maintenance as well as day-to-day operational changes. Pricing is based on a fixed rate per user and includes all support and maintenance. Your monthly statement will be presented in a short user-friendly format so you can find what you need at a glance.

### Ednetics Voice™ 5 YEAR

#### One Time Charges

POTS Installation - 0 Lines @ \$50 per Line	\$	0.00
Applicable Taxes and Fees Federal, State, County, and Local*	\$	0.00
<b>Total One Time Charges</b>	<b>\$</b>	<b>0.00</b>

#### Monthly Service Charges

3081 Standard Users @ \$25 each	\$	77,025.00
333 Analog / Fax Users @ \$25 each	\$	8,325.00
0 POTS Lines @ \$30 each	\$	0.00
Contract Discount @ \$12 per standard user	\$	(36,972.00)
Applicable Taxes and Fees Federal, State, County, and Local*	\$	676.01
<b>Total Monthly Service Charges</b>	<b>\$</b>	<b>49,054.01</b>

\*Taxes are estimated based on current rates and are subject to change

#### Eligible Charges

Monthly Service Charges	\$	49,054.01
One-Time Charges	\$	0.00
<b>Ineligible Charges</b>		
Phone Handsets	\$	2,320.82
Additional Local Gateways (SRST)	\$	0.00
<b>Total One-Time Charges</b>		<b>\$0.00</b>
<b>Total Monthly Charges (2015-16)</b>	<b>\$</b>	<b>51,374.83</b>

**Ednetics Voice™ 3 YEAR**

**One Time Installation Charges**

POTS Installation - 0 Lines @ \$50 per Line	\$	0.00
Applicable Taxes and Fees Federal, State, County, and Local*	\$	0.00
<b>Total One Time Charges</b>	\$	0.00

**Monthly Service Charges**

3081 Standard Users @ \$25 each	\$	77,025.00
333 Analog / Fax Users @ \$25 each	\$	8,325.00
0 POTS Lines @ \$30 each	\$	0.00
Contract Discount @ \$12 per standard user	\$	(36,972.00)
Applicable Taxes and Fees Federal, State, County, and Local*	\$	676.01
<b>Total Monthly Service Charges</b>	\$	49,054.01

\*Taxes are estimated based on current rates and are subject to change.

**Eligible Charges**

Monthly Service Charges	\$	49,054.01
One-Time Charges	\$	0.00

**Ineligible Charges**

Phone Handsets	\$	3,868.03
Additional Local Gateways (SRST)	\$	0.00
<b>Total One-Time Charges</b>	\$	0.00

<b>Total Monthly Charges (2015-16)</b>	\$	52,922.04
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Phone Handset Detail

PHONE MODEL	Cisco 3905	Cisco 7821	Cisco 7841	Cisco 8851	Cisco 8945	Cisco 9951	Cisco 9951 Video	Cisco CKEM	Cisco 8831
FEATURES									
Purchase Price	\$29.70	\$76.50	\$109.50	\$178.50	\$157.50	\$231.00	\$295.50	141.00	\$418.50
Price per month for 3 years	\$0.96	\$2.48	\$3.55	\$5.78	\$5.10	\$7.49	\$9.58	\$4.57	\$12.00
Price per month for 5 years	\$0.58	\$1.49	\$2.13	\$3.47	\$3.06	\$4.49	\$5.75	2.74	\$8.14
Number of phone lines	1	2	4	5	4	5	5		1
Switch port type	10/100	10/100	10/100/1000	10/100/1000	10/100/1000	10/100/1000	10/100/1000		10/100
Bluetooth support				3.0	2.0	2.0	2.0		
Key expansion module support				2					
Cisco unified video camera support							1		
Recommended for classrooms	•	•	•	•	•				
Recommended for office staff		•	•	•	•	•	•		
Recommended for administrators				•	•	•	•		
Recommended for very active communication needs				•		•	•		

\* - Purchase price listed above is valid through July 26, 2015. Price per month is good for twelve months after the date of a signed contract. Any handset listed can be added to the contract as a bundle created for University of Idaho, or an ala carte' option.



## Phone Handset Detail

5 Year/3 Year

## Ednetics Voice™ Phone Handsets | Purchase Outright

Ednetics Voice™ Phone Handsets	QTY	PRICE	TOTAL
Cisco Unified IP Phone - 3905	2505	\$ 29.70	\$ 74,398.50
Cisco Unified IP Phone - 7821	552	\$ 76.50	\$ 42,228.00
Cisco Unified IP Phone - 7841	0	\$ 109.50	\$ 0
Cisco Unified IP Phone - 7925	5	\$ 231.00	\$ 1,155.00
Cisco Unified IP Phone - 8945	0	\$ 157.50	\$ 0
Cisco Unified IP Phone - 8851	1	\$ 178.50	\$ 178.50
Cisco Unified IP Phone - 9951	0	\$ 231.00	\$ 0
Cisco Unified IP Phone - 9971	0	\$ 291.00	\$ 0
Cisco Conference Station - 8831	3	\$ 418.50	\$ 1,255.50
Cisco Wireless Microphone Kit, 8831 Series	0	\$ 195.00	\$ 0
Cisco Desktop Collaboration Experience DX650	0	\$ 508.50	\$ 0
Cisco Color Key Expansion Module	1	\$ 141.00	\$ 141.00
Cisco Unified Video Camera	0	\$ 72.00	\$ 0
Cisco Unified IP Endpoint Power Cube	0	\$ 22.50	\$ 0
Ednetics Voice™ Phone Handsets Total			\$ 119,356.50
Sales Tax			\$ 0.00
Total Purchase Price			\$ 119,356.50

5 Year

## Ednetics Voice™ Phone Handsets | Monthly Payment

Ednetics Voice™ Phone Handsets	QTY	PRICE	TOTAL
Cisco Unified IP Phone - 3905	2505	\$ 0.58	\$ 1,446.64
Cisco Unified IP Phone - 7821	552	\$ 1.49	\$ 821.10
Cisco Unified IP Phone - 7841	0	\$ 2.13	\$ 0
Cisco Unified IP Phone - 7925	5	\$ 4.49	\$ 22.46
Cisco Unified IP Phone - 8945	0	\$ 3.06	\$ 0
Cisco Unified IP Phone - 8851	1	\$ 3.47	\$ 3.47
Cisco Unified IP Phone - 9951	0	\$ 4.49	\$ 0
Cisco Unified IP Phone - 9971	0	\$ 5.66	\$ 0
Cisco Conference Station - 8831	3	\$ 8.14	\$ 24.41
Cisco Wireless Microphone Kit, 8831 Series	0	\$ 3.79	\$ 0
Cisco Desktop Collaboration Experience DX650	0	\$ 9.89	\$ 0
Cisco Color Key Expansion Module	1	\$ 2.74	\$ 2.74
Cisco Unified Video Camera	0	\$ 1.40	\$ 0
Cisco Unified IP Endpoint Power Cube	0	\$ 0.44	\$ 0
Ednetics Voice™ Phone Handsets Total			\$ 2,320.82
Sales Tax			\$ 0.00
Total Monthly Charge			\$ 2,320.82

3 Year

Ednetics Voice™ Phone Handsets | Monthly Payment

Ednetics Voice™ Phone Handsets	QTY	PRICE	TOTAL
Cisco Unified IP Phone - 3905	2505	\$ 0.96	\$ 2,411.06
Cisco Unified IP Phone - 7821	552	\$ 2.48	\$ 1,368.50
Cisco Unified IP Phone - 7841	0	\$ 3.55	\$ 0
Cisco Unified IP Phone - 7925	5	\$ 7.49	\$ 37.43
Cisco Unified IP Phone - 8945	0	\$ 5.10	\$ 0
Cisco Unified IP Phone - 8851	1	\$ 5.78	\$ 5.78
Cisco Unified IP Phone - 9951	0	\$ 7.49	\$ 0
Cisco Unified IP Phone - 9971	0	\$ 9.43	\$ 0
Cisco Conference Station - 8831	3	\$ 13.56	\$ 40.69
Cisco Wireless Microphone Kit, 8831 Series	0	\$ 6.32	\$ 0
Cisco Desktop Collaboration Experience DX650	0	\$ 16.48	\$ 0
Cisco Color Key Expansion Module	1	\$ 4.57	\$ 4.57
Cisco Unified Video Camera	0	\$ 2.33	\$ 0
Cisco Unified IP Endpoint Power Cube	0	\$ 0.73	\$ 0
Ednetics Voice™ Phone Handsets Total			\$ 3,868.03
Sales Tax			\$ 0.00
Total Monthly Charge			\$ 3,868.03



## Total Cost of Ownership

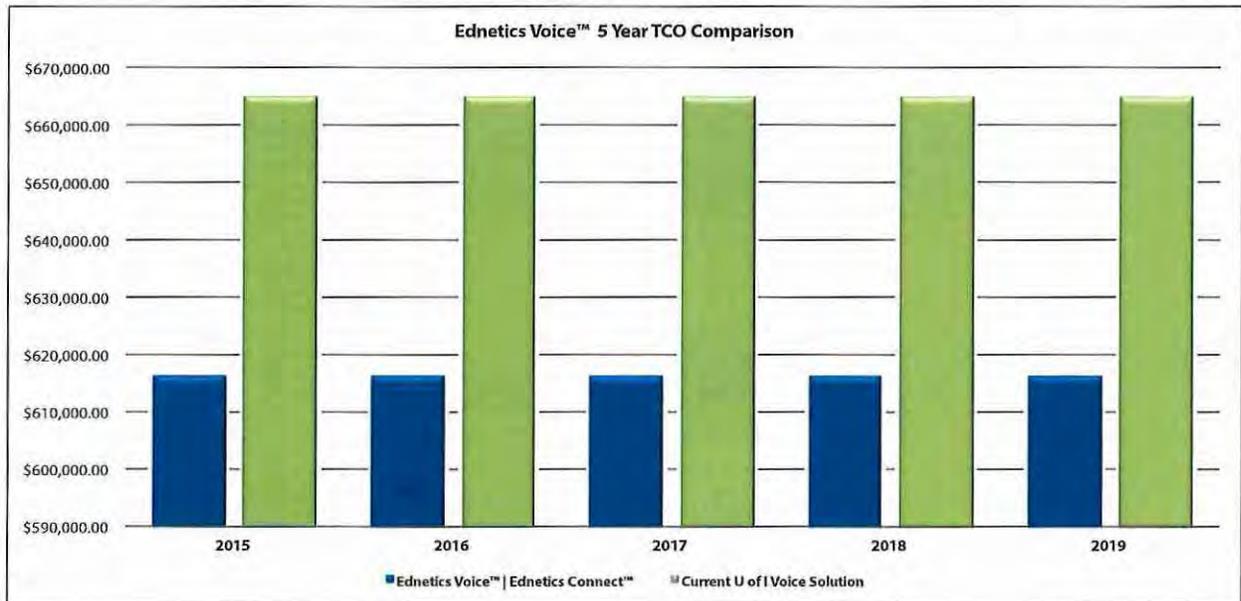
Ednetics Voice™ | Ednetics Connect™ TCO - 5 Year Service Contract Period

All Costs are Estimated

Number of users **3081**  
 Number of new handsets **3081**

Current U of I Voice Solution	5 YEAR PERIOD					Total 5 Year Cost
	2015	2016	2017	2018	2019	
Initial Cost of System	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
PSTN and LD	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 2,361,000.00
Maintenance	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Support	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
System Upgrades	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
FTE	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 965,000.00
<b>Total 5 Year Cost</b>	<b>\$ 665,200.00</b>	<b>\$ 3,326,000.00</b>				

Ednetics Voice™   Ednetics Connect™	5 YEAR CONTRACT					Total 5 Year Cost
	2015	2016	2017	2018	2019	
Handset Costs	\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 27,849.85	\$ 139,249.25
Ednetics Voice™	\$ 588,648.08	\$ 588,648.08	\$ 588,648.08	\$ 588,648.08	\$ 588,648.08	\$ 2,943,240.42
Additional Local Gateways (SRST)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total 5 Year Cost</b>	<b>\$ 616,497.93</b>	<b>\$ 3,082,489.67</b>				





Total Cost of Ownership

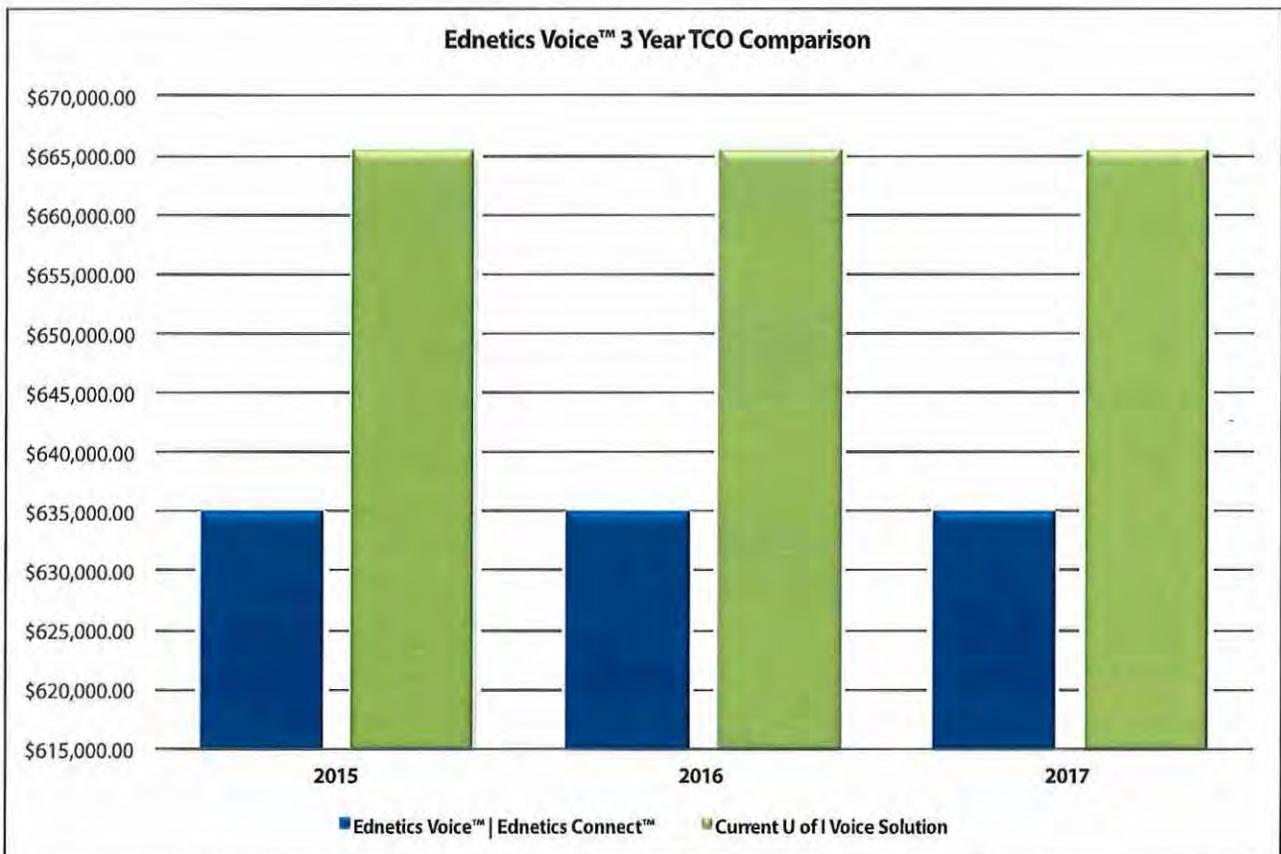
**Ednetics Voice™ | Ednetics Connect™ TCO - 3 Year Service Contract Period**

*All Costs are Estimated*

Number of users 3081  
 Number of new handsets 3081

Current U of I Voice Solution	3 YEAR PERIOD			
	2015	2016	2017	Total 3 Year Cost
Initial Cost of System	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
PSTN and LD	\$ 472,200.00	\$ 472,200.00	\$ 472,200.00	\$ 1,416,600.00
Maintenance	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Support	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
System Upgrades	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
FTE	\$ 193,000.00	\$ 193,000.00	\$ 193,000.00	\$ 579,000.00
<b>Total 5 Year Cost</b>	<b>\$ 665,200.00</b>	<b>\$ 665,200.00</b>	<b>\$ 665,200.00</b>	<b>\$ 1,995,600.00</b>

Ednetics Voice™   Ednetics Connect™	3 YEAR CONTRACT			
	2015	2016	2017	Total 3 Year Cost
Handset Costs	\$ 46,416.42	\$ 46,416.42	\$ 46,416.42	\$ 139,249.25
Ednetics Voice™	\$ 588,648.08	\$ 588,648.08	\$ 588,648.08	\$ 1,765,944.25
Additional Local Gateways (SRST)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total 3 Year Cost</b>	<b>\$ 635,064.50</b>	<b>\$ 635,064.50</b>	<b>\$ 635,064.50</b>	<b>\$ 1,905,193.50</b>





# Ednetics Voice

Unified Communications Service

## APPENDIX • TERMS AND CONDITIONS

- Exhibit A Usage Pricing
- Exhibit B 911 Disclosure Statement
- Exhibit C Acceptable Use Policy

These Terms and Conditions ("Agreement") are between Ednetics and the entity identified as the customer ("Customer"), each referred to as a "Party" and collectively referred to as the "Parties." This Agreement consists of the Sales Order(s) and any forms or authorizations attached hereto and/or incorporated herein by reference and these Terms and Conditions. The Parties agree to be bound by this Agreement and affirm that each have caused this Agreement to be executed by their respective duly authorized representatives on the dates written below their names.

1. **Service(s).** For purposes of this Agreement, "Service(s)" shall mean Ednetics Voice™ and the use of Ednetics equipment and services integral to performance and/or delivery of the Service(s) under this Agreement. Service(s) shall also refer to the Ednetics provided demarcation point between Customer's local area network ("LAN") and Ednetics wide area network ("WAN"). Specifically, the demarcation point is represented by a router and provides a physical demarcation ("Demarc") between Customer's LAN and Ednetics WAN. Ednetics is responsible for network on the WAN side of the Demarc and Customer is responsible for network on the LAN side of the Demarc.
2. **Ednetics Voice™.** Ednetics Voice is an enhanced voice telecommunications service, which uses an Internet Protocol ("IP") infrastructure to deliver voice communications and IP products. Ednetics Voice includes local dial-tone, local and long distance, international calling, access to directory assistance and operator services as well as Ednetics equipment and services integral to performance or delivery of Service under this Agreement. Ednetics Voice is a full-featured Voice over Internet Protocol (VoIP) Service and may be a stand-alone or hosted managed Service. Ednetics will provide Service(s) as referenced on the Sales Order(s) in accordance with the terms of this Agreement.
  - 2.1 **Handsets.** If ordered from Ednetics, the initial handsets are included with an Ednetics Voice™ Agreement on a zero percent (0%) lease with the cost of the handsets prorated over the term of the Agreement. Customer shall own the handsets upon full completion (including payment) of the Agreement Service Term. The purchase of additional handsets is considered an Upgrade pursuant to Section 18 and as such, the handset purchase will be prorated over the remaining Service Term unless other arrangements are made. .
  - 2.2 **Toll-Free Service.** Customer is responsible for all charges for toll free Service(s) provided by Ednetics. Ednetics assumes no liability where any claim arises out of Customer being provided with any toll-free number(s) other than the toll-free numbers(s) requested by Customer. Ednetics shall have no liability whatsoever for the use, misuse or abuse of Customer's toll-free Service by third parties, including without limitation, Customer's employees or any member(s) of the public who dial the Customer's toll-free number(s) by mistake. See Exhibit A Usage Pricing attached hereto and made a part of this Agreement by reference.
  - 2.3 **Long Distance Service(s).** Customer is responsible for all local and long distance Service(s) used with and without their knowledge. Where available, Ednetics provides long distance Service(s) at no charge within the U.S. 50 states and Canada, but excludes International calls. Calls not covered will be billed to you at the rate shown in Exhibit A.
  - 2.4 **Interruption of Service(s) Credit.** In the event there is any defect, error, omission, delay, mistake, interruption, suspension, or other failure in connection with furnishing Service(s) or maintenance of Service(s) and the same is reported to and confirmed by Ednetics (an "Interruption"), the liability, if any, of Ednetics shall in no event exceed an amount equivalent to the proportionate charge to Customer for the affected Service for the time period during which the interruption occurred (the "Interruption Credit") as outlined below. Ednetics shall not be liable nor shall any Interruption Credit be given to Customer for any Interruption which is: (1) caused by the willfulness or negligence of Customer, a third-party or any other entity other than Ednetics; (2) due to failure of equipment and systems provided by Customer or any other entity; (3) due to a force majeure event as set forth in Section 24 below; or (4) during periods when Customer elects to use Service(s) on an impaired basis. Customer hereby acknowledges and agrees that its sole and exclusive remedy for an Interruption shall be an Interruption Credit as follows:

2 - 4 Hours	25% of the daily recurring cost
4 - 8 Hours	75% of the daily recurring cost
8 - 24 Hours	100% of the daily recurring cost
Over 24 Hours	100 % of the daily recurring cost for each 8 hour period over 24 hours.
- 2.5 **Letter of Authorization.** Customer will be required to execute a Letter of Authorization ("LOA") in order for Ednetics to act as an authorized agent for ordering, porting numbers, and coordination of local and long distance access circuits that may be needed. The LOA, when executed, shall be incorporated into this Agreement by reference.
- 2.6 **911 Disclosure Statement.** Customer is required to execute the 911 Disclosure Statement contemporaneously with the first Sales Order. The 911 Disclosure Statement is attached hereto as Exhibit B and made a part of this Agreement by reference.
- 2.7 **Safeguarding Customer Proprietary Network Information.** Ednetics considers our Customers' proprietary network information (CPNI) as confidential. Ednetics will not share information specific to our Customers and/or their network with anyone other than the authorized representative(s) of Customer unless Customer sends written authorization to their Ednetics account manager. Such Letter of Authorization (LOA) must be signed by Customer's authorized representative stating the information Ednetics is to provide and to what party and/or company Ednetics is to disclose the information to upon request. This procedure extends during the term of the contract and will continue after the contract expires.

General Terms and Conditions

3. **Obligations of the Customer.** The customer agrees to provide all information, access, and support for timely installation and proper use of Service(s) and to comply with all of the terms and conditions of this Agreement. Customer also agrees that Customer's use of Service(s) will at all times be consistent with the terms outlined in Ednetics Acceptable Use Policy ("AUP") and will not be used in an unlawful manner, and will be used in such a manner as to prevent damage to Ednetics network and equipment. Ednetics AUP is

4. **Customer Representations.** Customer warrants that they have the legal right and ability to enter into this Agreement and are authorized to act on behalf the school, library, or state/local government entity. Customer represents and warrants that Customer name, contact information and registered location(s) for 911 are true and correct. Customer acknowledges and agrees that Ednetics relies on the information supplied by Customer and that providing false or incorrect information may result in delays in the provision and delivery of Service(s), the suspension or termination of Service(s) and the inability of a 911-dialed call to be correctly routed to emergency service personnel as further described in the 911 Disclosure Statement in Exhibit B. Customer agrees to promptly notify Ednetics whenever personal or billing information changes, including, but not limited to, Customer's name, address, e-mail address, telephone number, and credit card information if appropriate.
5. **Term Commitment.** For each Service, the term commitment of the Service will begin the date Service is first installed and made available to Customer unless Customer advises Ednetics in writing that Service is in material non-compliance with the specifications contained in the Sales Order(s), in which case the term commitment for that Service will not commence until such time as Ednetics and Customer mutually agree that the issues with Service have been resolved, and will continue for the number of months/years set forth in the applicable Sales Order ("Initial Service Term").
6. **Fees and Charges.** Customer shall pay for all Service(s) Ednetics supplies to Customer. Sales Order(s) specify the fees Customer will pay for Service(s) during the Service Term. The fees on the invoice are categorized as (1) "Monthly Charges," (2) "One Time Charges," and (3) "Other Charges." Monthly Charges are recurring and will be billed monthly in advance. One Time Charges are non-recurring and will be billed as they occur. Other Charges are usage charges and will be billed based on Customer's actual usage which could include per minute fees for long distance or per call fees as reflected in Exhibit A incorporated herein by reference. Ednetics will bill Customer and Customer will be responsible for other legally applicable charges including, but not limited to, federal and state universal service fund (USF), federal and state telecommunications relay service (TRS), state and county E911 surcharges, state and local sales taxes, and local utility taxes and any other applicable federal, state, county, or local taxes and fees. Customer's invoice will reflect all taxes and fees.
7. **Payment.** Ednetics will provide Customer with monthly invoices which will be due and payable thirty (30) days from the invoice date (the "Due Date"). For the purposes of billing and adjustments, Ednetics assumes there are thirty (30) days in a month and the Invoice Date is the 1<sup>st</sup> of each month. All Monthly Charges are billed one (1) month in advance and Other Charges, such as usage, international long distance, directory assistance charges and services installed prior to the invoice date (Partial Month Services) are billed in arrears. All One Time Charges for installation and/or changes of service are invoiced on the first invoice following the date charges were incurred. Your initial invoice could contain One Time Charges, pro-rated charges for Partial Month Services and Other Charges as well as Monthly Charges for services in advance. A late payment fee may be applied on balances remaining unpaid thirty (30) days following the date of the invoice in the amount of one and one-half percent (1½%) per month of the amount of the unpaid balance from the date of invoice. Subject to any applicable state or federal regulations, in the event Customer has an outstanding balance of fees due and owing under this Agreement, Ednetics shall not be obligated to transfer transportable, toll-free, local or other numbers to another carrier. In addition to the remedies contained in this Agreement, Ednetics reserves its right in law and equity including, but not limited to, its rights under the Uniform Commercial Code.
8. **Taxes.** Customer hereby acknowledges and agrees that all pricing for Service(s) and other charges due hereunder, including value added tax, sales taxes, duties, fees, levies or surcharges (including where applicable Universal Service Fund or similar surcharges) imposed by, or pursuant to the laws, statutes or regulation of any governmental agency or authority, are the sole responsibility of Customer and shall be paid promptly when due by Customer and Customer agrees to indemnify and hold Ednetics harmless from any liability therefor. Except as set forth herein, all amounts payable by Customer under this Agreement shall be made without any deduction or withholding and, except to the extent required by any law or regulation, free and clear of any deduction or withholding on account of any tax, duty or other charges of whatever nature imposed by any taxing or governmental authority. If Customer is required by any law or regulation to make any such deduction or withholding, Customer shall, together with the relevant payment, pay such additional amount as will ensure that Ednetics actually received and is entitled to retain, free and clear of any such deduction or withholding, the full amount which it would have received if no such deduction or withholding had been required. Notwithstanding the foregoing, a monthly Universal Service Fund charge shall be added to each invoice for Service(s) based upon the applicable total billed revenues, the amount of which shall be based upon the Federal Communications Commission assessment.
9. **E-Rate.** Ednetics Services contract, including this Agreement, begins upon the later of (a) its execution by both Ednetics and Customer and (b) Customer's E-rate funding approval or Customer approval to proceed with service. Customer understands and agrees that One Time Charges and Monthly Charges are Customer's firm contractual obligation for the duration of this contract after Customer receives E-rate funding or has given Ednetics a notice to proceed with service.
10. **Unauthorized Use of the Service(s).** Customer accepts full responsibility for the charges and fees invoiced for Ednetics provision of all Service(s) to Customer including, but not limited to, outbound and toll free Service(s), regardless of whether Customer authorized the use of the Service(s). Customer shall indemnify and hold Ednetics harmless from any and all costs, expenses, damages, claims or actions arising from any fraudulent or unauthorized use of Service(s). Customer shall not be excused from paying Ednetics for Service(s) provided to Customer or any portion thereof on the basis that fraudulent use of Service(s) comprised a corresponding portion of the Service(s) for which charges and fees are invoiced. In the event Ednetics discovers or reasonably believes that Service(s) are being used fraudulently, nothing contained herein shall prohibit Ednetics from taking immediate and all reasonable actions necessary to prevent the fraudulent use of the Service(s).
11. **BACK-UP POWER.** CUSTOMER ACKNOWLEDGES AND AGREES THAT, IF ACCESS TO AND USE OF SERVICE(S) (INCLUDING, BUT NOT LIMITED TO, EMERGENCY 911 SERVICE) IS DESIRED OR REQUIRED DURING A POWER OUTAGE, CUSTOMER IS SOLELY RESPONSIBLE TO PROVIDE APPROPRIATE BACK-UP POWER TO ANY EQUIPMENT LOCATED ON CUSTOMER'S PREMISES TO THE EXTENT SUCH EQUIPMENT MAY BE USED TO ACCESS AND USE OR IS OTHERWISE RELATED TO THE USE OF SERVICE(S). EDNETICS SHALL NOT BE RESPONSIBLE OR



Ednetics needs to retrieve the CPE during or upon the expiration or termination of the applicable Service Term. Customer agrees to cooperate with Ednetics in all communications with the landlord at the Customer's premises if requested by Ednetics even after the expiration or termination of the applicable Service Term so that Ednetics may retrieve physical possession of the CPE. Customer shall be responsible for any and all damages to the CPE caused by Customer or its end-users. Ednetics will not be responsible for any interference or interruption in Service(s) that are related to or caused by CPE. Customer is responsible for the initial and ongoing configuration of any equipment provided by Customer. If any equipment provided by Customer is not compatible or may not be used with the Service(s) and Customer terminates this Agreement or Service(s) as a result, Customer will be responsible for all Non-Recurring Charges for Service(s) that are noted on the Sales Order(s) as well as any third-party costs Ednetics may have incurred.

- 20. **Limitation of Liability.** Ednetics shall not be liable or responsible for any of the following: (1) the content of the information passing over Ednetics network; (2) the Internet or any information contained thereon; (3) unauthorized access to Customer transmission facilities or to Customer owned equipment; (4) unauthorized access or damage to, alteration, theft, destruction or loss of customer records or data; (5) claims for damages caused by Customer through fault, negligence or failure to perform Customer's responsibilities; (6) claims against Customer by any other party; (7) any act or omission of any other party furnishing services to Customer or the installation and/or removal of any and all equipment supplies by any other services provider; or (8) incorrect publication of listings or advertisements of phone numbers. Notwithstanding the foregoing, the liability of Ednetics, if any, for damages arising out of mistakes, omissions, interruptions, delays, errors, or defects in the Service(s) or equipment provided by Ednetics, if any, or for breach or warranties set forth in this Agreement, shall in no event exceed the Monthly Charges for Service(s) that are the subject of the claim. IF ANY LIABILITY IS IMPOSED ON EDNETICS, SUCH LIABILITY SHALL BE LIMITED AS PROVIDED IN THIS AGREEMENT, WHICH SHALL BE EDNETICS SOLE AND EXCLUSIVE LIABILITY REGARDLESS OF WHETHER LOSS OR DAMAGE IS CAUSED BY PERFORMANCE, NON-PERFORMANCE, OR NEGLIGENCE OF EDNETICS UNDER THIS AGREEMENT. EDNETICS SHALL HAVE NO LIABILITY TO CUSTOMER OR ANY THIRD-PARTY FOR OR WITH RESPECT TO ANY SPECIAL, INCIDENTAL, INDIRECT, CONSEQUENTIAL, OR PUNITIVE DAMAGES OF ANY NATURE OR FOR THE LOSS OF REVENUE, LOST PROFITS, LOSS OF BUSINESS, LOSS OF PROSPECTIVE OR POTENTIAL BUSINESS OR ECONOMIC LOSS OF ANY KIND FOR ANY REASON WHATSOEVER, REGARDLESS OF WHETHER EDNETICS IS INFORMED OF THEIR POSSIBILITY.
- 21. **Liability of Customer.** In the event any claim, demand, lawsuit or liability is made or asserted against Ednetics or any of the officers of Ednetics by any third-party and the same arises out of, or is directly or indirectly related to, or is caused by any act or omission of Customer, then, and in such event, Customer shall indemnify, defend and hold harmless Ednetics and its officers, agents and representatives of and from any and all such claims, demands, causes of actions and liability, including the payment of reasonable attorneys' fees to defend such action. Additionally, Customer shall reimburse Ednetics for damage to Ednetics Communications facilities including those due to any malfunction of any facilities or equipment provided by an entity other than Ednetics.
- 22. **Warranties.** EDNETICS DOES NOT WARRANT UNINTERRUPTED OPERATION OF THE SERVICE(S) AND SPECIFICALLY DISCLAIMS ANY OTHER WARRANTIES NOT MADE IN THIS AGREEMENT, EITHER EXPRESSED OR IMPLIED, INCLUDING THE WARRANTIES OF TITLE, MERCHANTABILITY AND FITNESS FOR PARTICULAR PURPOSE. EDNETICS DOES NOT WARRANT AND DOES NOT ASSUME ANY LIABILITY FOR ANY CONSEQUENCES SUFFERED BY ANY PERSON AS A RESULT OF OBTAINING INTERNET ACCESS INCLUDING, WITHOUT LIMITATION, DAMAGES ARISING FROM INTERNET CONTENT OR FROM COMPUTER VIRUSES.
- 23. **Transfer and Assignment.** Customer may not sell, assign or transfer any of Customers rights or obligations under this Agreement without Ednetics prior written consent. Ednetics may assign this Agreement upon notice to Customer.
- 24. **Force Majeure.** Any delay, interruption or nonperformance of any provision of this Agreement on the part of Ednetics caused by conditions beyond Ednetics reasonable control shall not constitute a breach of the Agreement and the time for performance of such provision shall be deemed to extend for a period equal to the duration of the conditions preventing performance. Such examples include, but are not limited to, acts of God, acts of civil or military authority, terrorist acts, riots, insurrections, epidemics, power blackouts, fire, explosion, vandalism, cable cut, adverse weather conditions, earthquakes, nuclear accidents, floods, governmental action, moratoriums or injunctions related to the construction and shortage of labor and materials (collectively a Force Majeure Event).
- 25. **Notices.** All notices, requests, demands or other communications which are required or may be given pursuant to the terms of this Agreement shall be in writing and shall be deemed to have been duly given (i) on the date of delivery if personally delivered by hand, (ii) upon the third day after such notice is (a) deposited in the United States mail, if mailed by registered or certified mail, postage prepaid, return receipt requested, or (b) upon the first business day following deposit if sent by overnight delivery by a nationally recognized overnight express courier, or (iii) by facsimile upon written confirmation (other than the automatic confirmation that is received from the recipient's facsimile machine) of receipt by the recipient of such notice.

Notices to Ednetics:	With a copy to:	If to Customer:
Ednetics, Inc.	Ednetics, Inc.	_____
Attn: Susan Lamb	Attn: Jenny George	_____
971 S. Clearwater Loop	971 S. Clearwater Loop	_____
Post Falls, Idaho 83854	Post Falls, Idaho 83854	_____
T (208) 619-2679	T (208) 777-4709	_____
F (208) 619-4161	F (208) 777-4708	_____

- 26. **Governing Law and Venue.** This Agreement shall be construed and governed in accordance with the laws of the state of \_\_\_\_\_ and venue for any actions arising under this Agreement shall be in the courts of county jurisdiction or the state of \_\_\_\_\_, as appropriate.
- 27. **Non-Disclosure and Publicity.** Customer shall not disclose to any third party the terms and conditions of this Agreement without the prior written consent of Ednetics.

- 28. **Entire Agreement.** This Agreement is the complete agreement between the Parties, concerning any and all services provided by Ednetics hereunder, and replaces any prior oral or written communications between the Parties. Except for prior obligations of confidentiality and/or nondisclosure, there are no conditions, understandings, agreements, representations, or warranties, expressed or implied, which are not specified in this Agreement.
- 29. **Addition/Modification.** Except as set forth in this Agreement, this Agreement may only be modified, amended or waived through a writing signed by an authorized employee of each Party.
- 30. **Severability.** In the event that any of the terms of this Agreement or the applications of any such term shall be invalid by any court of any competent jurisdiction, the remaining terms of this Agreement or their application shall not be affected thereby and shall remain in full force and effect.
- 31. **Counterparts.** This Agreement may be executed in any number of counterparts, each of which shall be an original, but all of which together shall constitute an Agreement. Facsimile signatures and electronic signatures (including electronically transmitted signed documents) shall be accepted and treated the same as an original

The parties have caused these General Terms and Conditions to be executed by their respective duly authorized representatives as of the last date signed below ("Effective Date").

**EDNETICS, INC.**

**CUSTOMER**

By: \_\_\_\_\_

By: \_\_\_\_\_

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

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

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

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

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

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

---

Long distance calls to points outside of the Continental United States and Canada are considered international. International includes Alaska and Hawaii. \$0.15 per minute

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Directory Assistance \$0.75 per call

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Operator Assistance Operator Assistance calls are charged to your credit card and current rates may be obtained from the Operator before placing your call.

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Toll Free Service within the Continental 48 U.S. States \$1.00/number/per month; and \$0.025/per minute

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Toll Free Conferencing \$1.00/number/per month; and \$0.055/per minute/per conferee

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**1. Enhanced 911 Service ("E911"):** When a caller from a registered location dials the digits 9-1-1 from any telephone that is associated with a phone number and a registered address, the phone number and address are automatically presented to the local emergency center serving the location.

**2. Basic 911 Service:** When a caller from a registered location dials the digits 9-1-1 using any telephone, the call is sent to the local emergency center serving that location, the telephone number and address associated with that telephone for call back and location purposes is not transmitted. The Basic 911 Service emergency center is not equipped to receive, capture or retain the telephone number associated with the caller's telephone service or the registered address. Accordingly, callers must be prepared to provide both call-back and address information. If the call is dropped or disconnected, or if the caller is unable to speak, the emergency operator answering the call will not be able to call the caller back or dispatch help to the caller's address if call-back and address information has not been provided by the caller.

**3. 911 service will not work if you experience a power outage, service outage, or a network disruption:** To mitigate this possibility, Ednetics provides automatic fail over to analog lines; however, the battery back-up is Customer's responsibility. In the event the battery back-up runs down or fails, Customer should maintain an alternate means of calling emergency services at all locations, such as 911 capable wireless handsets or wireline analog lines.

**4. You may not be able to reach the correct emergency services if your telephone number does not match your registered location information:** To accurately route 911 calls to the appropriate emergency call center, Customer must provide at least one Direct Inward Dial telephone number for each separate address location using VoIP telephone service as the call-back telephone number. To mitigate the possibility of not reaching the correct emergency services, Ednetics requires location information on all telephone number additions and/or changes that Ednetics or Customer perform.

**5. You may not be able to reach the correct emergency services if you move your phone to a location different from the address initially registered or change your telephone number:** Accurate location information must be registered each time Customer changes the phone's location or telephone number. If you do not, you may not be able to reach the correct emergency services and they may not be able to transfer your call to the correct emergency services. To mitigate this possibility, Ednetics will require this information on all moves, adds and/or changes Ednetics does for Customer and also of those that Customer performs.

**6. Customer responsibility:** It is Customer's responsibility to keep your registered locations and telephone numbers updated with Ednetics at all times, to make sure others know of the 911 limitations above and what to do in an emergency. Customer is also responsible to place 911 stickers or easily seen signs on or near your phones warning of the situations in 2 (if applicable), 3, 4, and 5 above.

**7. Limitation of Liability and Disclaimers.** CUSTOMER SPECIFICALLY AGREES THAT IN NO EVENT WILL EDNETICS OR ITS DIRECTORS, OFFICERS, EMPLOYEES, CONTRACTORS, OR AGENTS BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES ARISING, DIRECTLY OR INDIRECTLY, FROM OR IN CONNECTION WITH ANY USE OF, OR INABILITY TO USE, THE SERVICES OR WITH ANY USE OF, OR INABILITY TO USE, EMERGENCY 911 SERVICES IN CONNECTION THEREWITH. CUSTOMER ALSO AGREES TO RELEASE AND DISCHARGE EDNETICS, TOGETHER WITH ITS DIRECTORS, OFFICERS, EMPLOYEES, CONTRACTORS, AND AGENTS, FROM ANY AND AGAINST ALL ACTIONS, LAWSUITS, CLAIMS, DAMAGES, JUDGMENTS, LIABILITIES AND EXPENSES, INCLUDING WITHOUT LIMITATION REASONABLE ATTORNEYS' FEES, THAT CUSTOMER MAY OTHERWISE HAVE IN CONNECTION WITH USE, WHETHER BY CUSTOMER OR BY ANY OTHER PERSON OF THE SERVICES THAT ARE PROVIDED TO YOU UNDER THIS AGREEMENT (COLLECTIVELY, "CLAIMS"). TO THE FULLEST EXTENT PERMITTED BY LAW, YOU WAIVE YOUR RIGHT (AND COVENANT NOT) TO BRING SUIT FOR SAID CLAIMS AGAINST EDNETICS OR ANY OF THE OTHER PERSONS MENTIONED ABOVE.

**Acknowledged and Agreed**

Signature

Name \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

## Exhibit C | Acceptable Use Policy

1. **Unlimited Voice Services.** Customer agrees to use the unlimited service plan for traditional voice or fax calling of duration comparable to that of an average business customer. Customer agrees they will not employ methods, devices or procedures to take advantage of the unlimited service plan by using the voice or fax services excessively or for means not intended by Ednetics. Excessive use is defined by Ednetics as use that substantially exceeds the average call duration used by all other Ednetics unlimited voice service plans caused by excessive local number conference calling, monitoring services, data transmissions of broadcasts or transmission of recorded material. Ednetics has the right to terminate Customers' Service if, in its sole discretion, Ednetics determines that that Customer's use of the unlimited plan violates this prohibition or is otherwise "unreasonable" or results in abuse of the unlimited minute service plan.
  - a. Examples of "unreasonable" use are:
    - i. Re-sell, re-brand, re-supply, re-market or commercially exploit the unlimited service plan, without written consent, in order to aggregate traffic from more than one customer over an "unlimited line or trunk;
    - ii. Set-up routing functionality such that only outbound long-distance traffic is sent over the unlimited service; or
    - iii. Engage in any other conduct which is fraudulent or results in significant network congestion or degradation.
  - b. Examples of "abusive" use are:
    - i. Autodialing;
    - ii. Continuous, repetitive or extensive call forwarding;
    - iii. Continuous call session connectivity;
    - iv. Fax broadcasting;
    - v. Fax blasting;
    - vi. Telemarketing; or
    - vii. Any other activity that would be inconsistent with reasonable business use that may cause network congestion or jeopardizes the integrity of Ednetics.
2. **Lawful Purposes Only.** Customer may use Ednetics Services for lawful purposes only. Customer may not use Ednetics Service or equipment in any way that is illegal, improper, or inappropriate. Illegal, improper or inappropriate uses of Ednetics Services and/or equipment include the following:
  - a. Interfering with the ability to provide service to the Customer or other customers;
  - b. Use of the Service to threaten, abuse, harass, defame, deceive, defraud, interfere or invade another's privacy or engage in any similar behavior;
  - c. Use of the Service to impersonate another person, send bulk unsolicited messages, use data mining techniques, or other automated devices or programs to catalog, download, store, or otherwise reproduce or distribute information from Ednetics or use any automated means to manipulate the service; or
  - d. Use the Service for transmitting or receiving any communication or material of any kind which would constitute a criminal offense, give rise to a civil liability, or otherwise violate and applicable local, state, national or international law or encourage conduct that would constitute a criminal offense, give rise to a civil liability, or otherwise violate any applicable local, state, national or international law.
3. **Right of Termination.** Ednetics reserves the right to terminate the Service immediately and without advance notice if Ednetics, in its sole discretion, believes that Customer has violated any of the above restrictions.
4. **Theft of Service.** Customer may not use or obtain the Service in any manner that avoids Ednetics policies and procedures, including an illegal or improper manner. Customer will notify Ednetics immediately in writing if Customer believes the Service is stolen, used fraudulently, or otherwise being used in an unauthorized manner. If Customer notifies Ednetics of one of these events, Customer must provide an account number and a detailed description of the circumstances of the theft, fraudulent use, or unauthorized use of the Service.
5. **Revisions to this Acceptable Use Policy.** Ednetics reserves the right to revise, amend, or modify this AUP at any time in any manner. Any revision, amendment, or modification will be effective ten (10) days after Ednetics publishes such revision, amendment, or modification. Your continued use of our Services after such revision, amendment, or modification shall constitute your acceptance of the modifications to the AUP. Therefore, it is important that you review this AUP from time to time. IT IS YOUR RESPONSIBILITY TO CHECK THE WEBSITE AT [WWW.EDNETICS.COM](http://WWW.EDNETICS.COM) REGULARLY, AS ALL OR ANY PART OF THIS AUP MAY CHANGE WITHOUT NOTICE.

If you have questions about the AUP, or about your rights and responsibilities, please contact your Account Manager.

Ednetics Voice



RFP No. 15-30M

**University of Idaho**

Unified Communications  
as a Service (UCaaS)

# Table of Contents

## Appendix A

- Network Topology
- Ednetics Support Agreement
- Example Statement of Work
- Example Project Timeline
- Example Project Plan
- Handset Matrix and Pricing

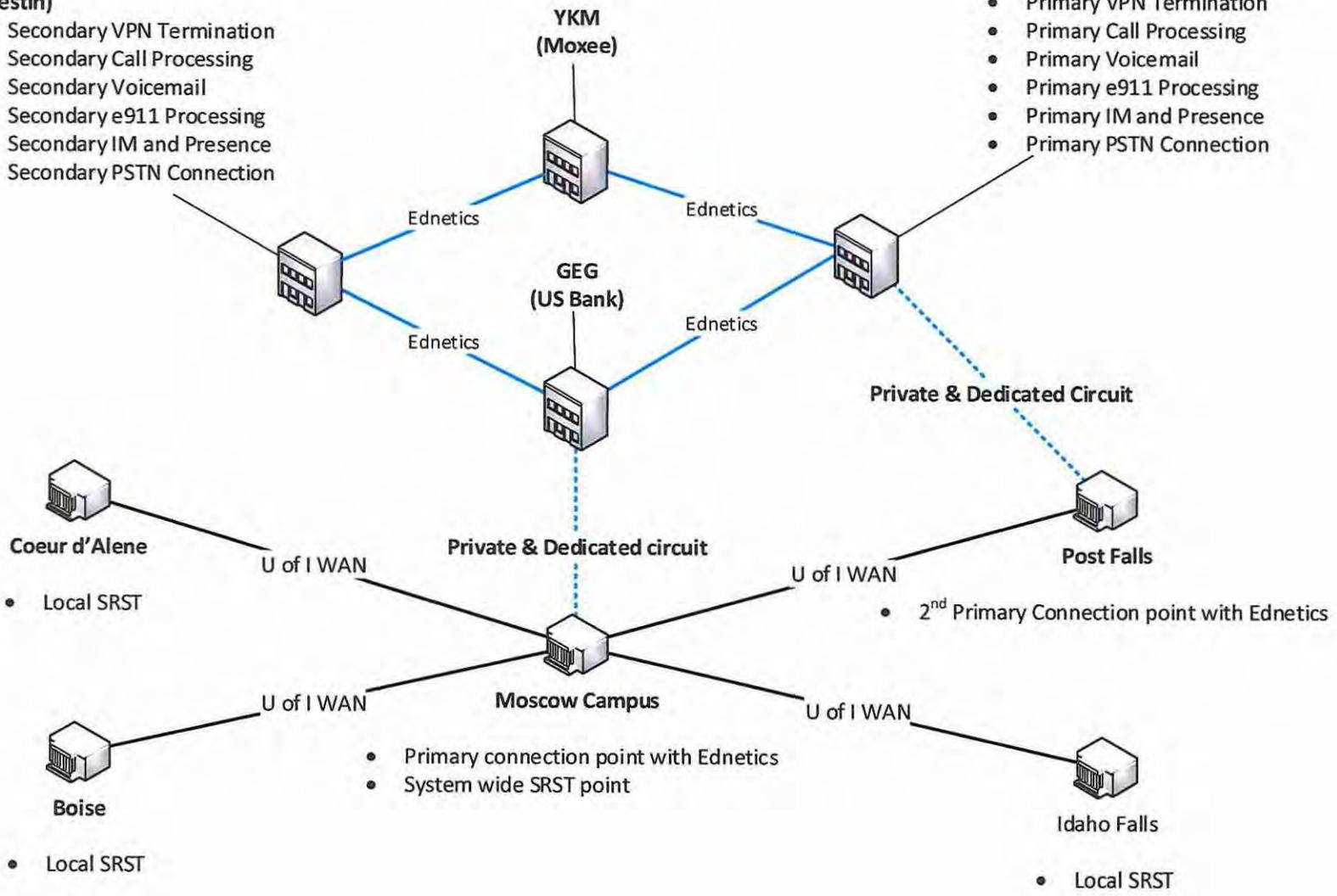
Ednetics Voice Network Topology

**SEA  
(Westin)**

- Secondary VPN Termination
- Secondary Call Processing
- Secondary Voicemail
- Secondary e911 Processing
- Secondary IM and Presence
- Secondary PSTN Connection

**Ednetics HQ  
(Post Falls)**

- Primary VPN Termination
- Primary Call Processing
- Primary Voicemail
- Primary e911 Processing
- Primary IM and Presence
- Primary PSTN Connection





## Support Plan

### Part of Your Technology Team

The Ednetics One Technology Support Plan provides support coverage for all designated technology under one convenient plan. Ednetics One customers have access to the expertise of the entire Ednetics team of specialized engineers. The plan includes unlimited expert technical support via phone, e-mail and remote support. You also get guaranteed response times to quickly and efficiently resolve your technology support issues. We are proud to be part of your team.

### Support Desk

Ednetics has a fully staffed, dedicated, support desk for quickly handling support requests. Support desk personnel enter individual support issues into the system so that each item can be properly tracked to its conclusion.

### Response Times

Ednetics will respond to properly submitted requests for support within the time specified below.

#### EMAIL SUPPORT

4 business hour response time

#### PHONE SUPPORT

4 business hour response time

#### REMOTE SUPPORT

4 business hour response time

#### ONSITE SUPPORT

Scheduled. Emergency onsite support is available next business day or as replacement parts are available.

#### SYSTEM OUTAGE

1 hour or less response time

#### ON-SITE SUPPORT

Billed hourly at \$125/hr

### Account Manager

James Hersey

E-mail: james.hersey@ednetics.com

Toll Free: 888.809.4609



## Support Plan

### **Support Information**

In order to ensure your support request is properly received and response times are met, you must submit your support request through:

E-mail: [support@ednetics.com](mailto:support@ednetics.com)

OR

Toll Free Phone: 877.809.4610

Ednetics offices are open Monday through Friday 6 a.m. to 7 p.m. Pacific Standard Time excluding Ednetics observed holidays. For emergencies an on-call technician can be reached 24x7. Normal cases submitted outside of Ednetics business hours will be queued promptly the next business day.

### **Remote Support**

Ednetics will provide remote support via VPN, WebEx, phone, and e-mail, for items covered under this plan. This support includes troubleshooting for existing equipment and configurations. If during the course of remote support, Ednetics finds it necessary, on-site support services will be scheduled.

### **Onsite Support Services**

On-site support services are available at a reduced, flat-rate of \$150/hr. Travel is billed at half the on-site rate. If a support issue cannot be resolved via remote support, on-site support services will be scheduled next business day or as replacement hardware is available.

### **Moves, Adds and Changes**

The Ednetics support staff will assist our customers with processing MAC requests (see definitions) remotely using system management tools.



## Support Plan

### **Update and Patch Support**

Ednetics will perform licensed minor updates, bug fixes, and security patches for systems covered under this plan to resolve support issues.

### **Hardware Support**

Ednetics support staff will assist in identifying cases where hardware repair or replacement is necessary. Ednetics can also assist in the resolution of hardware cases up to repair or replacement. Hardware repair or replacement requires 3<sup>rd</sup> party warranties, such as Cisco SMARTnet or warranty.

### **Technology and Personnel Requirements**

This plan requires the use VPN access. The customer firewall must be capable of IPSEC or SSL VPN connectivity. This is necessary to improve remote response capability. Alternatively, we can provide an Ednetics-owned firewall to be used for VPN termination.

This plan also requires the designation of a customer personnel resource, or resources with administrator level credentials for all items under support to participate in remote troubleshooting when necessary.

### **Exclusions**

This plan is not intended to provide tier I support (see definitions) or as a replacement for existing customer resources. It is intended supplement existing customer resources by providing technical support at tiers II and III (see definitions). This plan is not intended to provide desktop support to end users, their workstations or software applications. This plan does not include the setup of new equipment or software, new configurations or configuration changes (other than MAC). On-site MAC requests are not covered and would be handled separately on a time and materials or project basis. Cisco Unified Contact Center support excludes the creation of new applications and the creation of new or modification of existing scripts. This contract does not provide hardware warranty or replacement. However, hardware repair or replacement assistance is available and can be obtained through the Ednetics support desk.



## Support Plan

### Definitions

#### ***Ednetics Observed Holidays***

New Year Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, December 25, December 24 or 26.

#### ***Move, Adds and Changes (MACs)***

These are system administration tasks, which become necessary when users or certain devices are added to, removed from or change their location on the network or phone system. Ednetics One Technology Support Plan currently covers the following types of MACs:

##### ***CISCO VOICE***

Phone line changes, User display changes, Call behavior e.g.; hunt groups, Addition of a new phone instrument, User Management in Unity Connection, Variations to Message Handler, VM PIN reset, add/ remove line, CCX User/Application Management (agent/supervisor/group assignments, associate application with existing scripts or prompts.

#### ***Tier I Support***

Initial support level, end-user support, and basic customer issues. Tier I Support is not included in the plan.

#### ***Tier II Support***

Administrator support level, more in-depth customer issues, investigating and trouble-shooting to solve issues.

#### ***Tier III Support***

Highest support level, expert level trouble-shooting and analysis

**University of Idaho UCaaS Example Statement of Work**

Customer will be responsible for providing any desired POTS lines for SRST failover.  
 Customer will be responsible for any client-side configurations, software installs and upgrades (such as Jabber IM).  
 Customer will be responsible for IP handset deployment.  
 Customer will be responsible for filling out any Ednetics provided customer templates.  
 Customer must consent to a Materials Staging Agreement, so Ednetics can receive project related equipment.  
 Customer must provide Ednetics with fully functional IPSEC VPN remote access to the voice network/s. This is to remain in place for the duration of the Ednetics Voice service contract.

**Project Summary:** Ednetics will provision and connect the customer network to the Ednetics Connect Network (Connect). This private network (as opposed to the internet) provides the pathway for us to deliver our managed voice service. Because Connect is a private network (as opposed to the internet), we can proactively monitor the health and performance of the network and take corrective actions as necessary. This also allows us to provide our customers with end to end quality of service for more sensitive applications such as voice and video. Ednetics will work with the customer to identify the components of the Cisco UCM system to be installed. This will include both hardware and software applications. Existing Cisco handsets and gateways can be re-used with the Ednetics Voice service. Voice applications that are not currently used by the customer, but are a part of the Ednetics voice service, will be installed and integrated with the rest of the voice application suite. Each core application will be installed as a two server cluster for high-availability. Each cluster will be installed on redundant UCS hardware systems which are backed up by both UPS and generator. Ednetics has been selling and installing Cisco equipment as a Cisco Partner for over 11 years. Routing, switching, firewalls and wireless have been part of that business since the beginning. We assist our customers with developing routing plans for both WAN and LAN environments, from collapsed core to advanced routing protocols. Internally on the LAN, we design and configure IP schemas for network segmentation via VLANs.

**Ednetics will perform preparation tasks including:**

- Receive all products (except UPSs and phone handsets/ATAs) at our offices for staging.
- Create an asset sheet for the equipment involved in the installation.
- Label all equipment with Ednetics or Customer labeling standards.
- Associate customer SMARTnet contracts to Ednetics' profile.
- Check any data in customer templates for consistency, data integrity.
- Work with Customer Network Administrators to determine IP schema for voice network/s.
- Obtain any upgrade files and media for UCM servers, register upgrade licenses.

**Ednetics will perform build tasks including:**

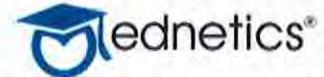
- Configure networked devices with appropriate IP information in accordance with IP schema.
- Load UCM server software on one (1) Publisher and one (1) Subscriber servers.
- Install server licensing, server activation, networking parameters.
- Import project user and device data into the UCM cluster (data provided via customer template).
- Load latest recommended IOS version on any project voice gateways.
- Configure gateways within the UCM cluster.

**Ednetics will perform install tasks including:**

- Verify the new UCM cluster is functioning and communicating across sites.
- Complete on-site programming and make any final changes to system data.
- Rack & install the voice gateway, ensure it is operation on the network as expected.

**Ednetics will perform test/documentation tasks including:**

- Perform thorough testing including incoming calls, outgoing calls, caller ID, 911 etc.
- Test call processing in a server failover situation.



#### **Unity Connection (High Availability)**

*Users will be responsible for checking their old voicemail prior to the migration, it will NOT be migrated.  
Users will need to go through the Unity Connection setup process to create their new voicemail boxes.  
Customer will be responsible for filling out any Ednetics provided customer templates.  
Customer will be responsible for the client-side desktop integration (e-mail software) to Unity Connection.  
Customer must provide Ednetics with fully functional IPSEC VPN remote access to the voice network/s. This is to remain in place while the project or any subsequent support contracts are in effect.*

**Section Summary:** *Ednetics will build a new two-server Unity Connection cluster for the project.*

#### **Ednetics will perform preparation tasks including:**

- Associate customer SMARTnet contracts to Ednetics' profile.
- License and register the Unity Connection hardware and software.

#### **Ednetics will perform build/Install tasks including:**

- Import voicemail subscriber information and create mailboxes (provided via customer template).

#### **Integrate new Unity Connection cluster to the new UCM cluster, register ports etc.**

- Verify that the Unity Connection cluster is healthy and communicating as expected.

#### **Ednetics will perform test/documentation tasks including:**

- Verify call handler behavior and flow including main line test, hunt group test etc.
- Verify advanced feature behavior including dropped call, visual VM, etc.
- Test voicemail operation in a server failover situation.
- Provide documentation including verification of initial backup and asset sheet for new equipment.

#### **Emergency Responder (High Availability)**

*Customer will be responsible for filling out any Ednetics provided customer templates.  
Customer will be responsible for providing per site (internal) 911 call notification data (via template).  
Customer will be responsible for installation of necessary backup hardware/software for ER server.  
Customer will be responsible for working with local Safety authorities to verify response zone requirements.  
Customer will be responsible for providing detailed physical layer documentation (via template) including switchport to patch panel to room and/or area (zone dependent).  
Customer must provide Ednetics with fully functional IPSEC VPN remote access to the voice network/s. This is to remain in place while the project or any subsequent support contracts are in effect.*

**Section Summary:** *Ednetics will build a new two-server ER cluster for the project.*

#### **Ednetics will perform preparation tasks including:**

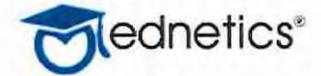
- Register licensing and install licenses on the new ER server.
- Associate customer SMARTnet contracts to Ednetics' profile.

#### **Ednetics will perform build/install tasks including:**

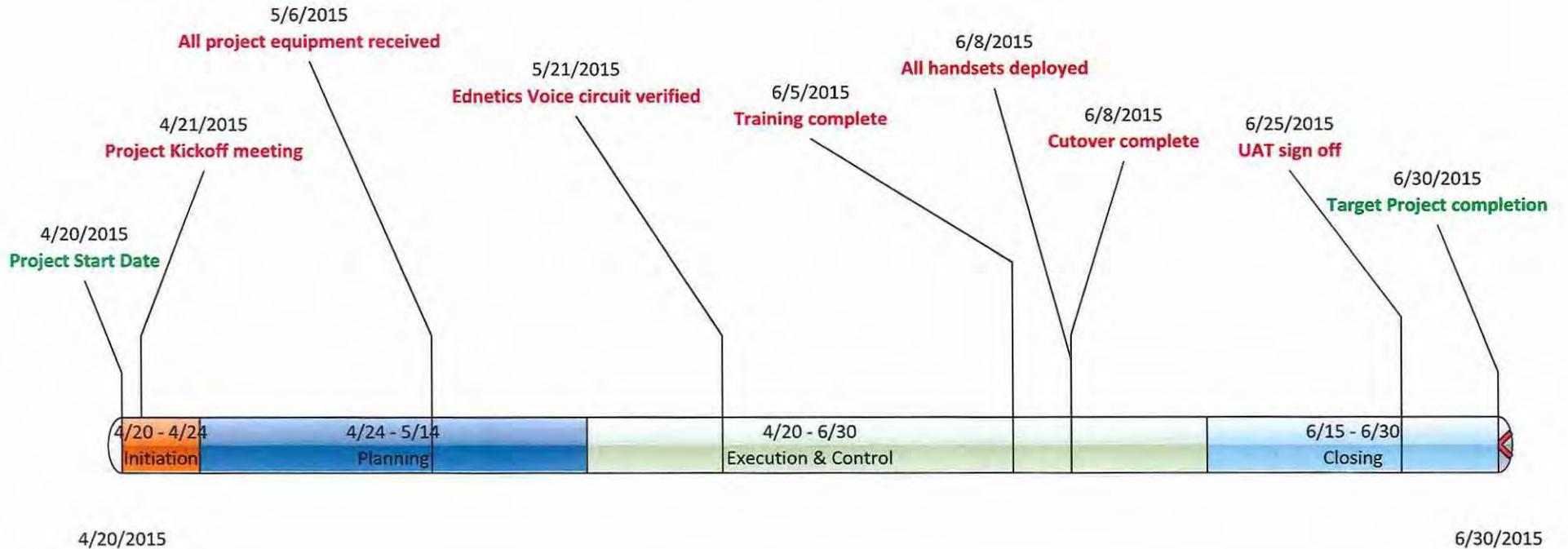
- Install ER server including licensing, service activation and networking parameters on new server.
- Perform initial programming of new ER server including, user accounts and passwords.
- Perform recommended software upgrades on both servers per best practice.
- Configure any UCM cluster integration changes including modifications to dial plan.
- Complete any on-site programming including changes to switch lists, un-located and manual devices etc.
- Coordinate with Customer for the upload any new E911 data to the PS/ALI database through Telco.

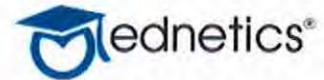
#### **Ednetics will perform test/documentation tasks including:**

- Notify local PSAP (if applicable) including scheduling tests (if pre-scheduling is necessary).
- Verify PS/ALI data with dispatchers including test calls from different zones/buildings.
- Verify dispatchers are able to return disconnected 911 calls to originating caller.
- Verify local notifications are working including message delivery (email) and ring behavior.
- Test ER operations in a server failover situation.

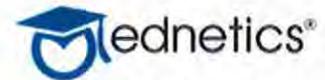


# 2015 University of Idaho UCaaS Example Timeline





Task Name	Duration	Start	Finish
<b>University of Idaho UCaaS Example Project Plan</b>	<b>52 days</b>	<b>Mon 4/20/15</b>	<b>Tue 6/30/15</b>
<b>Milestones</b>	<b>52 days</b>	<b>Mon 4/20/15</b>	<b>Tue 6/30/15</b>
Project Kick Off Meeting	0 days	Tue 4/21/15	Tue 4/21/15
Device Worksheets Distributed	0 days	Tue 4/21/15	Tue 4/21/15
All project equipment (product) received	0 days	Wed 5/6/15	Wed 5/6/15
Emergency Responder Discussion	0 days	Thu 5/7/15	Thu 5/7/15
Voice Gateways configured and staged	0 days	Fri 5/8/15	Fri 5/8/15
Phone system data compiled	0 days	Wed 5/13/15	Wed 5/13/15
Ednetics Voice circuit tested	0 days	Thu 5/21/15	Thu 5/21/15
Ednetics Voice gateway installed and tested	0 days	Thu 5/21/15	Thu 5/21/15
Phones distributed and registered. Register at least one phone from each site for testing	10 days	Tue 5/26/15	Mon 6/8/15
Complete ER programming	0 days	Tue 5/26/15	Tue 5/26/15
Validate phones are registered to Call Manager	0 days	Mon 6/8/15	Mon 6/8/15
Training - Front office staff	4 days	Tue 6/2/15	Fri 6/5/15
Cutover	0 days	Mon 6/8/15	Mon 6/8/15
Analog takeover	0 days	Mon 6/8/15	Mon 6/8/15
Test	0 days	Mon 6/8/15	Mon 6/8/15
On site Post Cutover Support	2 days	Tue 6/9/15	Wed 6/10/15
Lessons Learned and Support handoff	0 days	Tue 6/23/15	Tue 6/23/15
Customer acceptance and signoff	0 days	Thu 6/25/15	Thu 6/25/15
Project Completion	0 days	Tue 6/30/15	Tue 6/30/15
<b>**Green highlighted milestones are identified on Example Timeline**</b>			
<b>Project Tasks</b>	<b>41 days</b>	<b>Wed 4/15/15</b>	<b>Wed 6/10/15</b>
<b>Project Initiating</b>	<b>3 days</b>	<b>Mon 4/20/15</b>	<b>Wed 4/22/15</b>
PO/Notice to Proceed/Funding Commitment Received - customer is ready to move forward	1 hr	Mon 4/20/15	Mon 4/20/15
ITPM identified	1 hr	Mon 4/20/15	Mon 4/20/15
PM Welcome Letter	1 hr	Mon 4/20/15	Mon 4/20/15
Project Kick Off Meeting	2 hrs	Tue 4/21/15	Tue 4/21/15
Project Communication plan	2 hrs	Tue 4/21/15	Tue 4/21/15
SRST Discussion	0.5 hrs	Tue 4/21/15	Tue 4/21/15
UPS Discussion	0.5 hrs	Tue 4/21/15	Tue 4/21/15
Informacast Discussion	0.5 hrs	Tue 4/21/15	Tue 4/21/15
Paging integration Discussion	0.5 hrs	Tue 4/21/15	Tue 4/21/15
eFax Discussion	0.5 hrs	Tue 4/21/15	Tue 4/21/15
Confirm/update Engineering schedule	4 hrs	Tue 4/21/15	Wed 4/22/15
Distribute Device and other worksheets to customer	0.5 hrs	Tue 4/21/15	Tue 4/21/15
<b>Project Planning</b>	<b>24 days</b>	<b>Mon 4/20/15</b>	<b>Thu 5/21/15</b>
List of Responsibilities (Scope of Work) reviewed and approved	0.5 days	Mon 4/20/15	Mon 4/20/15
Faxing option discussion	0.5 days	Mon 4/20/15	Mon 4/20/15
Device Counts Received & Order Placed (Handset Demo if needed)	3 days	Mon 4/20/15	Thu 4/23/15
Emergency Responder Discussion	0 days	Thu 5/7/15	Thu 5/7/15
<b>Voice Planning Tasks</b>	<b>4 days</b>	<b>Mon 4/20/15</b>	<b>Thu 4/23/15</b>
Customer Interviews incoming circuits/lines (IT Staff)	1 day	Mon 4/20/15	Mon 4/20/15
Customer Interviews - Phones (Front Desk, Staff)	1 day	Tue 4/21/15	Tue 4/21/15
Customer Interviews - Emergency Response (IT Staff)	0.5 days	Wed 4/22/15	Wed 4/22/15
Customer Interviews - Voicemail	0.5 days	Wed 4/22/15	Wed 4/22/15
Post Interview summary review with Customer	1 day	Thu 4/23/15	Thu 4/23/15
<b>Voice Design</b>	<b>4.5 days</b>	<b>Mon 4/20/15</b>	<b>Fri 4/24/15</b>
<b>CUCM</b>	<b>4.5 days</b>	<b>Mon 4/20/15</b>	<b>Fri 4/24/15</b>

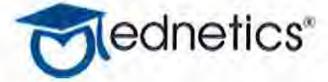


Licensing requirements	0.5 days	Fri 4/24/15	Fri 4/24/15
Call Routing/Dial Plan	0.5 days	Mon 4/20/15	Mon 4/20/15
CSS	0.5 days	Mon 4/20/15	Mon 4/20/15
Partition	0.5 days	Tue 4/21/15	Tue 4/21/15
Pickup group (if applicable)	0.5 days	Tue 4/21/15	Tue 4/21/15
Configure data into script writers	0.5 days	Wed 4/22/15	Wed 4/22/15
Gateways	0.5 days	Wed 4/22/15	Wed 4/22/15
<b>CUC</b>	<b>4 days</b>	<b>Mon 4/20/15</b>	<b>Thu 4/23/15</b>
Licensing requirements	0.5 days	Thu 4/23/15	Thu 4/23/15
Determine needed VM ports	0.5 days	Thu 4/23/15	Thu 4/23/15
Mailbox setup	0.5 days	Mon 4/20/15	Mon 4/20/15
Call / Directory Handler setup	0.5 days	Mon 4/20/15	Mon 4/20/15
<b>CER</b>	<b>3 days</b>	<b>Tue 4/21/15</b>	<b>Thu 4/23/15</b>
Onsite Alert Notifications	1 day	Tue 4/21/15	Tue 4/21/15
Default ERLs	1 day	Wed 4/22/15	Wed 4/22/15
Building / Zone information	1 day	Thu 4/23/15	Thu 4/23/15
<b>Network Planning tasks</b>	<b>4 days</b>	<b>Wed 4/22/15</b>	<b>Mon 4/27/15</b>
Network topology review	2 days	Wed 4/22/15	Thu 4/23/15
IP Schema review	1 day	Fri 4/24/15	Fri 4/24/15
Closet patching review	0.5 days	Mon 4/27/15	Mon 4/27/15
PoE requirements review	0.5 days	Mon 4/27/15	Mon 4/27/15
Review network design with customer	1 day	Wed 4/22/15	Wed 4/22/15
<b>Device Inventory</b>	<b>12 days</b>	<b>Wed 5/6/15</b>	<b>Thu 5/21/15</b>
Receive equipment at warehouse	4 days	Wed 5/6/15	Mon 5/11/15
Scan Mac Addresses to Asset Sheet	1 day	Tue 5/12/15	Tue 5/12/15
Ednetics Voice Gateway installed and tested	1 day	Thu 5/21/15	Thu 5/21/15
Planning Checkpoint Meeting - **Cannot move forward until the above items are completed**	0 days	Fri 5/22/15	Fri 5/22/15
<b>Project Executing</b>	<b>26 days</b>	<b>Wed 5/6/15</b>	<b>Wed 6/10/15</b>
Licensing Ordered	2 days	Wed 5/6/15	Thu 5/7/15
VLAN Provisioned	1 day	Fri 5/8/15	Fri 5/8/15
Server VM provisioned	0.5 days	Mon 5/11/15	Mon 5/11/15
Training dates identified	0.5 days	Mon 5/11/15	Mon 5/11/15
Pre-execution Checkpoint Meeting - **Cannot move forward until the above items are completed**	1 day	Tue 5/12/15	Tue 5/12/15
Worksheet Discussion	0.5 days	Wed 5/13/15	Wed 5/13/15
Customer will have existing data pulled and device worksheet populated	0.5 days	Wed 5/13/15	Wed 5/13/15
Worksheets sent to Customer	0.5 days	Thu 5/14/15	Thu 5/14/15
Device worksheet with AD Username field updates complete	2 days	Thu 5/14/15	Mon 5/18/15
ER Zoning + Alerting worksheets completed	2 days	Mon 5/18/15	Wed 5/20/15
Call Handler (call tree) worksheets completed	2 days	Wed 5/20/15	Fri 5/22/15
Paging needs defined	0.5 days	Fri 5/22/15	Fri 5/22/15
Worksheets received by Ednetics	1 day	Mon 5/25/15	Mon 5/25/15
CER programming Completed	0 days	Tue 5/26/15	Tue 5/26/15
<b>Network Verification tasks</b>	<b>3 days</b>	<b>Wed 5/27/15</b>	<b>Fri 5/29/15</b>
Verify QoS	1 day	Wed 4/15/15	Wed 4/15/15
Verify PoE availability	2 days	Wed 5/27/15	Thu 5/28/15
<b>Voice Implementation tasks</b>	<b>12 days</b>	<b>Tue 5/26/15</b>	<b>Wed 6/10/15</b>
Onsite staging of handsets	1 day	Tue 5/26/15	Tue 5/26/15
Handsets deployed	9 days	Wed 5/27/15	Mon 6/8/15
Training - Front office staff	4 days	Tue 6/2/15	Fri 6/5/15



<b>Cutover tasks:</b>			
Data pushed	3.2 days	Wed 6/3/15	Mon 6/8/15
Device Data	0.2 days	Wed 6/3/15	Wed 6/3/15
LDAP Integration	0.2 days	Wed 6/3/15	Wed 6/3/15
Call Handlers built	0.2 days	Wed 6/3/15	Wed 6/3/15
Voicemail boxes imported	0.2 days	Wed 6/3/15	Wed 6/3/15
ER Zones built	0.2 days	Thu 6/4/15	Thu 6/4/15
Pre-cutover review	1 day	Thu 6/4/15	Fri 6/5/15
<b>Cutover</b>	<b>1 day</b>	<b>Mon 6/8/15</b>	<b>Mon 6/8/15</b>
911 Testing	0.5 days	Mon 6/8/15	Mon 6/8/15
SRST Failover Testing	0.5 days	Mon 6/8/15	Mon 6/8/15
Onsite support (Cut day, +1, +2)	2 days	Tue 6/9/15	Wed 6/10/15
<b>Project Management Tasks</b>	<b>52 days</b>	<b>Mon 4/20/15</b>	<b>Tue 6/30/15</b>
<b>Initiating</b>	<b>5.63 days</b>	<b>Mon 4/20/15</b>	<b>Mon 4/27/15</b>
PM assignment and Customer Introduction letter	0.5 hrs	Mon 4/20/15	Mon 4/20/15
Project Kick off Meeting	1 hr	Tue 4/21/15	Tue 4/21/15
Create an ActiveCollab Project entry	1 day	Tue 4/21/15	Wed 4/22/15
*** Phase Milestone: Project Kickoff (Announcement, Presentation, and/or Meeting to Organize team & initiate the Requirements Gathering Process)	0 days	Mon 4/20/15	Mon 4/20/15
Setup Project Server instance	0.5 days	Tue 4/21/15	Tue 4/21/15
Develop Communications Plan & Implementation Calendar	3 days	Tue 4/21/15	Fri 4/24/15
Develop a Project Management Schedule	1 day	Fri 4/24/15	Mon 4/27/15
<b>Planning</b>	<b>14 days</b>	<b>Wed 4/22/15</b>	<b>Tue 5/12/15</b>
Develop a Resource Plan	3 days	Wed 4/22/15	Mon 4/27/15
Create Scope Document	2 days	Mon 4/27/15	Wed 4/29/15
Work Breakdown Structure	2 days	Wed 4/29/15	Fri 5/1/15
Master Project Plan (set baseline)	4 days	Fri 5/1/15	Thu 5/7/15
Risk Mitigation Plan	0.5 days	Thu 5/7/15	Thu 5/7/15
Issue Mitigation Process	0.5 days	Thu 5/7/15	Fri 5/8/15
Support/Operations Plan	1 day	Fri 5/8/15	Mon 5/11/15
Define your Change Request process	1 day	Mon 5/11/15	Tue 5/12/15
<b>Project Monitoring and Controlling</b>	<b>52 days</b>	<b>Mon 4/20/15</b>	<b>Tue 6/30/15</b>
<b>Meetings</b>	<b>51 days</b>	<b>Tue 4/21/15</b>	<b>Tue 6/30/15</b>
<b>Project Status Meeting</b>	<b>51 days</b>	<b>Tue 4/21/15</b>	<b>Tue 6/30/15</b>
Project kickoff / status	1 day	Tue 4/21/15	Tue 4/21/15
Weekly project status	1 day	Tue 4/28/15	Tue 4/28/15
Weekly project status	1 day	Tue 5/5/15	Tue 5/5/15
Weekly project status	1 day	Tue 5/12/15	Tue 5/12/15
Weekly project status	1 day	Tue 5/19/15	Tue 5/19/15
Weekly project status	1 day	Tue 5/26/15	Tue 5/26/15
Weekly project status	1 day	Tue 6/2/15	Tue 6/2/15
Weekly project status	1 day	Tue 6/9/15	Tue 6/9/15
Weekly project status	1 day	Tue 6/16/15	Tue 6/16/15
Adhoc Meetings (as needed)		TBD	TBD
<b>Change Control</b>			
Change Control Plan	5 days	Mon 4/20/15	Fri 4/24/15
Baseline	5 days	Mon 4/20/15	Fri 4/24/15
Change control meetings (as needed)		TBD	TBD
<b>Project Closing</b>	<b>12 days</b>	<b>Mon 6/15/15</b>	<b>Tue 6/30/15</b>
Closeout	<b>12 days</b>	<b>Mon 6/15/15</b>	<b>Tue 6/30/15</b>

**ATTACHMENT 3**



Support and Operations Handoff  
Lessons Learned Review  
Project Documentation Cleanup  
Project Signoff  
Closeout Party  
\*\*\* Phase Milestone: Closing Complete

0.5 days	Tue 6/23/15	Tue 6/23/15
0.5 days	Tue 6/23/15	Tue 6/23/15
2 days	Tue 6/23/15	Thu 6/25/15
1 day	Thu 6/25/15	Fri 6/26/15
1 day	Tue 6/30/15	Tue 6/30/15
1 day	Tue 6/30/15	Tue 6/30/15



Handset Detail

PHONE MODEL	Cisco 3905	Cisco 7821	Cisco 7841	Cisco 8851	Cisco 8945	Cisco 9951	Cisco 9951 Video	Cisco CKEM	Cisco 8831
FEATURES									
Purchase Price	\$29.70	\$76.50	\$109.50	\$178.50	\$157.50	\$231.00	\$295.50	141.00	\$418.50
Price per month for 3 years	\$0.96	\$2.48	\$3.55	\$5.78	\$5.10	\$7.49	\$9.58	\$4.57	\$12.00
Price per month for 5 years	\$0.58	\$1.49	\$2.13	\$3.47	\$3.06	\$4.49	\$5.75	2.74	\$8.14
Number of phone lines	1	2	4	5	4	5	5		1
Switch port type	10/100	10/100	10/100/1000	10/100/1000	10/100/1000	10/100/1000	10/100/1000		10/100
Bluetooth support				3.0	2.0	2.0	2.0		
Key expansion module support				2					
Cisco unified video camera support							1		
Recommended for classrooms	•	•	•	•	•				
Recommended for office staff		•	•	•	•	•	•		
Recommended for administrators				•	•	•	•		
Recommended for very active communication needs				•		•	•		

Need help figuring out which handsets will best suit your particular needs within your budgetary requirements? Please don't hesitate to contact us toll free at (888) 809-4609 or send an email to [info@ednetics.com](mailto:info@ednetics.com). We look forward to hearing from you.

**CONSENT**  
**OCTOBER 22, 2015**

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**SUBJECT**

Idaho Experimental Program to Stimulate Competitive Research (EPSCoR)  
Committee Appointment

**REFERENCE**

February 2014	Board appointed Matt Borud as the Commerce Representative to the Idaho EPSCoR Committee (Replacing Gynii Gilliam)
October 2014	Board appointed Dr. Todd Allen as the INL Representative to the Idaho EPSCoR Committee (Replacing Dr. Hill)
February 2015	Board appointed Senator Tibbits to the Idaho EPSCoR Committee (Replacing Senator Goedde)
April 2015	Board appointed Dr. Cornelis J. Van der Schyf to the Idaho Experimental Program to Stimulate Competitive Research (replacing Dr. Howard Grimes)

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section III.W.

**BACKGROUND/DISCUSSION**

The Experimental Program to Stimulate Competitive Research (EPSCoR) represents a federal-state partnership to enhance the science and engineering research, education, and technology capabilities of states that traditionally have received smaller amounts of federal research and development funds. As a participating state, Idaho EPSCoR is subject to federal program requirements and policy established by the Idaho State Board of Education (Board). The purpose of EPSCoR is to build a high-quality, academic research base to advance science, technology, engineering and mathematics (STEM) to stimulate sustainable improvements in research and development capacity and competitiveness.

Idaho EPSCoR is guided by a committee of sixteen (16) members appointed by the Board for five (5) year terms. The membership of this committee is constituted to provide for geographic, academic, business and state governmental representation as specified in Board policy including the Vice Presidents of Research from the University of Idaho, Boise State University, and Idaho State University. Members are allowed to serve up to three (3) consecutive terms.

The Idaho EPSCoR Committee is recommending the reappointment of Representative Maxine Bell, Dr. Dennis Stevens, and Doyle Jacklin. Additionally, the committee is requesting the appointment of Senator Roy Lacey and Gynii Gilliam. Senator Lacey would be replacing Senator John Tippetts, who was recently appointed to lead the Department of Environmental Quality and has stepped down from the Senate and Gynii Gilliam as a private sector

**CONSENT**  
**OCTOBER 22, 2015**

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representative, replacing Doug Chadderdon who has recently stepped down. Ms. Gilliam had previously served on the committee as a private sector representative in 2011, and then as the Department of Commerce representative in 2012. In 2014 she left the Department of Commerce and was replaced by Matt Borund.

**ATTACHMENTS**

Attachment 1 – Current Committee Membership	Page 3
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**STAFF COMMENTS AND RECOMMENDATIONS**

Representative Maxine Bell, Doyle Jacklin and Dennis Stevens, if reappointed, will continue to serve as representative of their current positions. All three of these individuals have been valuable representatives on the Committee. Under their leadership the Idaho EPSCoR program has continued to grow and receive national recognition. If appointed, Gynii Gilliam would serve the remained of Doug Chadderdon’s term. Senator Lacey would serve a full five year term as Senator Tippits term expired on June 30<sup>th</sup>, 2015.

Board staff recommends approval.

**BOARD ACTION**

I move to reappoint Representative Maxine Bell, Doyle Jacklin and Dennis Stevens to the Idaho Experimental Program to Stimulate Competitive Research Idaho Committee effective immediately and expiring on Jun 30<sup>th</sup>, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to appoint Senator Roy Lacey to the Idaho Experimental Program to Stimulate Competitive Research Idaho Committee as a representative of the Idaho Senate effective immediately and expiring on Jun 30<sup>th</sup>, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to appoint Gynii Gilliam to the Idaho Experimental Program to Stimulate Competitive Research Idaho Committee as a representative of the private sector effective immediately and expiring on Jun 30<sup>th</sup>, 2019.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**CONSENT  
OCTOBER 22, 2015**

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*EPSCoR Committee Members*

**VOTING MEMBERS (16 members)**

<b>Member Name</b>	<b>Original Appt.</b>	<b>Re-appointment</b>	<b>Expires</b>	<b>Representing</b>	<b>Position</b>
Barneby, David G.	9/9/2008	12/16/2013	6/20/2018	Private Sector	(Retired)VP Nevada Power
Bell, Maxine	12/13/2006	10/22/2015	6/30/2020	House of Rep	House of Rep.
Chadderdon, Douglas J.	9/8/2008		6/30/2019	Private Sector	President, Great Floors, LLC
Cornelius Van der Schyf	4/16/2015		Ex-officio	VPR	ISU - Interim VPR
John Tibbits	2/1/2015		6/30/2020	Senate	State Senate
Todd Allen	10/1/2014		Ex-officio	INL	
Jacklin, Doyle	12/13/2006	2/18/2010	6/30/2020	Private Sector	Chairman
Mclver, John "Jack"	9/9/2008		Ex-officio	VPR	UI - VPR
Dave Tuthill	8/16/2012		6/30/2017	Private Sector	
Noh, Laird	7/1/2011	12/9/2010	6/30/2016	Private Sector	Vice-Chair
Ray, Leo	7/1/2011	12/9/2010	6/30/2016	Private Sector	Fish Breeders
Rudin, Mark	12/13/2006		Ex-officio	VPR	BSU - VPR
Shreeve, Jean'ne	12/13/2006		6/30/2019	Private Sector	UI - Professor
Stevens, Dennis	12/13/2006	2/18/2010	6/30/2020	Private Sector	Physician
Roberto, Francisco (Frank)	7/1/2011	12/9/2010	6/30/2016	Private Sector	INL - Biological Systems Department (Private)
Matt Borud	2/22/2014		Ex-officio	Commerce	Idaho Department of Commerce

**NON-VOTING MEMBERS (2 members)**

<b>Member Name</b>	<b>Original Appt.</b>		<b>Expires</b>		<b>Position</b>
TBD	----		Ex-officio		Representative from Governors Office
Bill Goesling	----		Ex-officio		Idaho State Board Members

**CONSENT  
OCTOBER 22, 2015**

**MAXINE T. BELL**  
DISTRICT 25  
JEROME & TWIN FALLS  
COUNTIES



HOME ADDRESS  
194 SOUTH 300 EAST  
JEROME, IDAHO 83338  
(208) 324-4296  
EMAIL: mbell@house.idaho.gov

**House of Representatives  
State of Idaho**

Dr. Laird Noh, Chair  
Idaho Experimental Program to Stimulate Competitive Research (EPSCoR) Committee  
875 Perimeter Drive  
M.S. 3029  
Moscow, Idaho 83844-3029

Re: Reappointment to EPSCoR

July 20, 2015

Dear Dr. Noh,

It has been a tremendous learning experience and honor to represent the Idaho House of Representatives as a member of the EPSCoR Committee. As Chair of the House Appropriations Committee, it is important that I have a working knowledge of all education budgets. More importantly, I need to know how education spending works to promote the economic well-being of the state. The research activity of our universities is vital to the health of the state economy.

I appreciate the opportunity to continue to serve as a member of this committee, working closely with the Research Vice President to pursue committee goals.

Sincerely,

*Maxine T. Bell*

Maxine T. Bell

**MAXINE T. BELL**  
DISTRICT 25  
JEROME & TWIN FALLS  
COUNTIES



HOME ADDRESS  
194 SOUTH 300 EAST  
JEROME, IDAHO 83338  
(208) 324-4296  
EMAIL: mbell@house.idaho.gov

## **House of Representatives State of Idaho**

Maxine T. Bell, Jerome, Idaho serves in the Idaho House of Representatives from District 26, comprising Jerome and Minidoka Counties. Representative Bell worked as an active partner with her husband, Jack on a family row-crop farm until 1997 when the Bells retired from the day-to-day operation. They are parents of one son, Jeff and three grandchildren.

Representative Bell worked as a school librarian for nine years. She retired from the school in the spring of 1988 to run for the Legislature, winning a seat held by a six-year incumbent. Representative Bell was appointed to the Agriculture Committee where she served as vice-chairman, the Resources/Conservation Committee, and in her second term she was appointed to the powerful Appropriations Committee. She now serves as Chairman of Appropriations and Co-chairman of the Joint Finance and Appropriations Committee (JFAC).

Other activities in the Legislature include a membership in EPSCoR, Chairman of the Attaché Committee, member of the ad hoc Energy Committee; and the Joint Legislative Oversight Committee.

Other activities included serving on the Idaho Farm Bureau Board of Directors and Vice-Chairman of the American Farm Bureau Women from 1986 until 2004. In 1994, Representative Bell participated in a working trip to Ukraine for the Farmer-to-Farmer Program with the U.S. State Department. She worked with host families to assist women in learning organizational skills, lobbying and business planning. International networking continued in 1995, when she conducted workshops for farmwomen in St. Petersburg, Russia. She returned to Kharkov, Ukraine in 1997, and again to Odessa, Ukraine in November of 1999, to assist various Ukrainian women's councils. Upon returning to the United States, she assisted in a fund raising effort to build a cannery in Ukraine. Further, she participated in a trade mission to China, Japan and South Korea.

Representative Bell received the Friend of Agriculture award from the Farm Bureau in four of her terms; "Ag All-Star" from all farm organizations in the past six years; an FFA honorary degree in 1991; Legislator of the Year by the Idaho Association of Soil Conservation Districts in 1992 and 1996, and Co-operatives Friend in 1995. In the fall of 2005, she was honored with the President's Medallion by Idaho State University. In 2006, she was named Legislator of the Year by the Idaho Library Association. In 2007, she received the Idaho Professional Technical Education Distinguished Service Award, and in 2008, she was named a Henry Toll Fellow for Outstanding Achievement and Service to State Government.

Representative Bell currently serves on the Executive Board of the Council of State Governments (CSG), the Executive Committee of CSG-West, is past chairman of the Fiscal Affairs Committee for CSG-West, and past chairman for both the Fiscal Affairs Committee and Rural Development Committee for the National Conference of State Legislatures (NCSL).

**CONSENT  
OCTOBER 22, 2015**

July 13, 2015

Idaho State Board of Education

To Whom It May Concern:

This letter is to express my interest in reappointment to the Idaho EPSCoR Committee when my current term expires. I have served as both an EPSCoR Committee member and as State Committee Chairman during periods of increasing EPSCoR funding for the State of Idaho. In addition to attending several National EPSCoR, NSF, and EPSCoR Coalition Meetings, I have consistently been involved in providing advice and assistance in the numerous grant proposal development efforts to the various EPSCoR federal agencies. I feel this experience, together with my business experience as past President of Jacklin Seed Company and currently Managing Partner of a family business park gives me an appreciation as to how important research in science, technology, math, and engineering is to our state.

I graduated from Washington State University with a Bachelor's of Science degree in Seed Physiology and Soil Chemistry and then received an honorary Doctorate Degree from the University of Idaho. Following university graduation, I served as an officer in the US Navy's Pacific Fleet followed by six years in the Navy Reserve as Commanding Officer of the Naval Training Command's Center, Spokane, WA.

In summary, I believe my credentials and past business experience as well as EPSCoR, involvement qualifies me for reappointment to the EPSCoR Committee. I have enjoyed my past tenure on the EPSCoR Committee and would look forward to being able to continue contributing to this important effort in the future.

I respectfully request reappointment to the Idaho EPSCoR Committee.

Sincerely,

Doyle W. Jacklin

DWJ/law

epscor reappointment.doc

**CONSENT  
OCTOBER 22, 2015**

**Doyle W. Jacklin, Chairman**

Partner, Riverbend Commerce Park  
Coeur d'Alene, Idaho

Doyle Jacklin is managing partner in Riverbend Commerce Park, where high-tech tenants assist each other and network together as a casual business association. He graduated from Washington State University with a BS in Agronomy, having a specialization in Seed Physiology and Soil Chemistry, and has an honorary Doctorate of Administrative Science from the University of Idaho. He was past president of Jacklin Seed Company and Simplot Turf and Horticulture Group. Jacklin has served as president, Better Law and Turf Institute; chairman, American Seed Trade Association's Lawn Seed Division; vice president, USA, Canadian Seed Trade Association; president, Spokane, Washington Kiwanis Club; chairman of the board of directors, Vera Water & Power Company; chairman, University of Idaho's College of Business and Economics Advisory Board; president, Western Seed Association; and is a member or an officer of numerous other associations. Jacklin served four years aboard a U. S. Naval Pacific Fleet destroyer as operations officer and four years as commanding officer, Military Training Division, of the U. S. Naval Reserve's Eastern Washington and Northern Idaho Command.

**CONSENT  
OCTOBER 22, 2015**

July 21, 2015

Laird Noh  
Chairman, Idaho EPSCOR Committee

Dear Laird:

I have enjoyed working with you and the Idaho EPSCOR Committee for over a decade. I would like to be considered for appointment for another term on this committee. For over 10 years I was the Chairman of the Higher Education Research Committee (HERC). For 30 years I have been Director of Infectious Diseases at the Boise VA Medical Center. I have had continuous Federal Funding from the Department of Veterans Affairs for investigations regarding bacterial infections caused by group A streptococcus, methicillin resistant Staphylococcus aureus, Clostridium difficile, Clostridium perfringens, etc.

I have given clinical and research talks at 65 medical centers in the USA and at National meetings for 30 years. In addition, I have been an invited lecturer at over 30 international medical centers or international meetings. I have been awarded the prestigious Infectious Disease Society of America Citation Award for my research work on group A streptococcal infections.

I have served as reviewer for numerous NIH, Department of Defense and VA study sections to review research grants and funding. I have been consultant to the CDC, WHO and NIH on matters related to severe group A streptococcal infections. This year, I was Chairman of the Infectious Disease Society of America's Guideline Committee for the diagnosis and treatment of skin and soft tissue infections. This year, I also gave the Keynote Address to the annual meeting of the Idaho Academy of Sciences.

All of these activities have prepared me to serve as a member of the State of Idaho EPSCOR Committee. Thank you for your considering me for this post. I have also attached a current CV.

Dennis L. Stevens, Ph.D., M.D., FIDSA, FACP  
Associate Chief of Staff, Research & Development Service  
Chief, Infectious Diseases Section  
Veterans Affairs Medical Center  
Boise, ID

Professor of Medicine  
University of Washington School of Medicine  
Seattle, WA

Address: 500 West Fort Street, Boise, ID 83702  
Phone: 208-422-1599  
Cell: 208-412-3573  
e-mail: dlstevens@mindspring.com; dennis.stevens@va.gov

**CONSENT  
OCTOBER 22, 2015**

CURRICULUM VITAE

NAME: Dennis L. **Stevens**

BORN: November 26, 1941 - Ft. Benton, Montana

EDUCATION: 1964 University of Montana, Missoula, Montana, B.A. (Microbiology)

1967 Montana State University, Bozeman, Montana, Ph.D.  
(Microbiology)

1971 University of Utah College of Medicine, Salt Lake City, Utah, M.D.

POSTGRADUATE TRAINING:

1971-72 Intern, Department of Medicine, University of Utah Medical Center, Salt Lake City, Utah

1972-74 Resident, Department of Medicine, University of Utah Medical Center, Salt Lake City, Utah

1975-77 Fellowship, Infectious Disease Service, Department of Medicine, Brooke Army Medical Center, San Antonio, Texas

FACULTY POSITIONS HELD:

1979-85 Assistant Professor, Department of Medicine, Division of Infectious Diseases, University of Washington School of Medicine, Seattle, WA

1983-05 Adjunct Faculty, College of Health Related Professions, Idaho State University, Pocatello, ID

1984- Adjunct Faculty, Department of Biology, Boise State University, Boise, ID

1984- Affiliate Associate Professor of Microbiology, Molecular Biology and Biochemistry, University of Idaho, Moscow, ID

1986-92 Associate Professor of Medicine, University of Washington School of Medicine, Seattle, WA

1992- Professor of Medicine, University of Washington School of Medicine, Seattle, WA

2005- Affiliate Faculty, Department of Microbiology, Idaho State University

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**HOSPITAL POSITIONS HELD:**

- 1974-75 Internist, Department of Medicine, Kenner Army Hospital, Fort Lee, VA
- 1977-79 Assistant Chief, Infectious Disease Service, Department of Medicine, Brooke Army Medical Center, San Antonio, TX
- 1979- Chief, Infectious Disease Section, Veterans Affairs Medical Center, Boise, ID
- 2004- Associate Chief of Staff, Research and Development Service, Veterans Affairs Medical Center, Boise, ID

**HONORS AND AWARDS:**

- 1964-67 National Institute of Health Training Grant Fellowship Montana State University
- 1967 Sigma Xi
- 1971 American Association of Medical Colleges Fellowship, University of Belgrade, Department of Infectious Diseases, Belgrade, Yugoslavia
- 1977- U.S. Army Meritorious Service Award
- 1982- Fellow, American College of Physicians
- 1983 Outstanding Clinical Teacher Award, University of Washington, Primary Care Internal Medicine Program, Veterans Administration Medical Center, Boise, ID
- 1988 Fellowship, Infectious Diseases Society of America
- 1988 International Society of Toxicology
- 1990 Elected to membership, Western Society for Clinical Investigation
- 1990- Member, Severe Streptococcal Infection Collaborative Study Group, Centers for Disease Control, Atlanta, GA
- 1991 Elected to membership, Western Association of Physicians

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- 1991 Distinguished Alumni Award, University of Montana
- 1991 Convener-Moderator, Cytokines Scientific Session, American Society for Microbiology national meeting, Dallas, Texas, May 1991
- 1991 Convener-Moderator, Endotoxins and Exotoxins Scientific Session, Interscience Conference on Antimicrobial Agents and Chemotherapy meeting, Chicago, October 1991
- 1992 Coordinator-Moderator, Infectious Disease Scientific Session AFMR/ASCI/AAP Western Regional Meeting, Carmel, California, February 1992
- 1992 9th Annual Lewis Wannamaker Lecturer, "Streptococcal Toxic Shock Syndrome", University of Minnesota, June 12, 1992
- 1992 Invited Lecturer, Annual Meeting of the Infectious Diseases Society of Mexico, Huatulco, Mexico, October 1992
- 1992 President Elect, Lancefield Society, U.S.A.
- 1993 Visiting Scientist, Dutch Society of Microbiology Annual Meeting, Utrecht, Holland, May 1993
- 1994 Convener-Moderator, Infectious Disease Scientific Session AFMR/ASCI/AAP Western Regional Meeting, Carmel, California, February 1994
- 1994 Convener-Moderator, "Superantigen Disease," Infectious Diseases Society of America annual meeting, Orlando, Florida, October 1994
- 1994 Participant, National Institutes of Health, Symposium on Severe Group A Streptococcal Infections, November 1994
- 1994 Consultant, United Nations World Health Organization, Symposium on Severe Group A Streptococcal Infections, December 1994
- 1995 International Advisory Committee. First International Conference on the Molecular Genetics and Pathogenesis of the Clostridia, Phoenix, Arizona, 1995
- 1995 President, Lancefield Society, U.S.A.
- 1995 Consultant, National Institutes of Health, Division of Allergy and Infectious Diseases, Severe Invasive Group A Streptococcal

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- Infections, June 1995
- 1995 Member, Idaho State Board of Education Higher Education Research Council
- 1998 Elected, Association of American Physicians
- 1999 Vice Chairman, Idaho State Board of Education, Higher Education Research Council
- 1999 Pfizer Professorship, Univ of Utah, Dept of Medicine, Surgery, Obstetrics, and Gynecology. "Pathogenesis of Necrotizing Soft Tissue Infections"
- 1999 Keynote lecture: "Pathogenesis of Group A Streptococcal Toxic Shock Syndrome", International Meeting of the Lancefield Society, October 1999 Auckland New Zealand
- 2000 Infectious Diseases Society of America, Society Citation
- 2001 Selected, Best Doctors in America
- 2001 Surgical Infections Society, William Altemeier Invited Lecturer: "Invasive Soft Tissue Infections", Snowbird, UT.
- 2002 Keynote Speaker, 18<sup>th</sup> Annual Harold D. Rose, M.D. Memorial Lecture: Streptococcal Toxic Shock Syndrome. Medical College of Wisconsin, Milwaukee, Wisconsin.
- 2006 President, Anaerobe Society of the Americas
- 2006-2007 President, Lancefield Society
- 2009 Endowed Lecture: Invasive Group A Streptococcal Infections. Royal College of Physicians, Edinburgh, Scotland, June 2009

**BOARD CERTIFICATION:**

- 1972 Diplomate, National Board of Medical Examiners
- 1976 Diplomate, American Board of Internal Medicine
- 1978 Diplomate, American Board of Internal Medicine - Sub-specialty in Infectious Diseases

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**CONSENT  
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CURRENT LICENSES TO PRACTICE:

1975- State of North Carolina  
1990- State of Idaho

PROFESSIONAL ORGANIZATIONS:

1967- Member, American Society of Microbiology  
1972-77 Associate, American College of Physicians  
1977-82 Member, American College of Physicians  
1980- Member, American Heart Association of Idaho  
1980- Member, Idaho Academy of Science  
1980- Member, Idaho Lung Association  
1981- Member, American Society of Photobiology  
1981- Member, American Federation of Clinical Research  
1981- Member, Infectious Diseases Society of America  
1982- Fellow, American College of Physicians  
1988- Fellow, Infectious Diseases Society of America  
1988- International Society on Toxinology  
1988- Member, International Lancefield Society  
1990- Member, Western Society for Clinical Investigation  
1990- Charter member, International Society for Anaerobic Bacteria  
1991- Member, Western Association of Physicians  
1994-96 President, US Lancefield Society

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1996-00	International Advisory Committee, Molecular Genetics and Pathogenesis of the Clostridia
1999	International Advisory Committee, Lancefield Society
2003	President elect, Anaerobe Society of the Americas
2006	President, Anaerobe Society of the Americas
2006	President, Lancefield Society

**TEACHING RESPONSIBILITIES**

1. Medical Student Lectures: Three 1.5 hour lectures each quarter to each group of third year students (endocarditis, central nervous system infections, diarrheal diseases).
2. House Staff Training: Lectures on antibiotics, septic shock, 4 Show and Tell lectures
3. WWAMI student clerkships: 5-6 one month rotations/year
4. Infectious Disease Clinic: Weekly, teaching medical students and residents
5. Trainees Mentored (since 2003):
  1. Yongsheng Ma, M.D., Ph.D. Postdoctoral fellow 2003-2005.
  2. Michael Aldape, PhD candidate, 2003- 2006
  3. Michael Aldape, PhD. VA Career Development Awardee, 2007 – 2010.
  4. Tanyalak Parimon, MD, Research Fellow, 2005 – present
  5. Anna Karlson, MS candidate, Idaho State University, 2005-2009
  6. Stephanie Hamilton, PhD candidate, University of Idaho, 2007 – present
  7. Zhi (Lily) Li, PhD, Post-doctoral Research Fellow, 2008 – 2011
  8. Devin Bolz, Ph.D, Post-doctoral Fellow (2012=2015)
  9. Todd Perkins, Ph.D, Post-doctoral Fellow (2014-present)

**EDITORIAL EXPERIENCE:**

1. Section Editor, Pathogenesis and Immune Response Section, Current Opinions in Infectious Diseases, 1991-present.
2. Invited Reviewer - New England Journal of Medicine, Journal of American Medical Association, Journal of Clinical Microbiology, Journal of Infectious Diseases, Clinical Infectious Diseases, Blood, New York State Journal of Medicine, American Review of Respiratory Disease, Obstetrics and Gynecology, Journal of Pediatrics, European Journal of Clinical Microbiology and Infectious Diseases; Infectious Disease in Clinical Practice,

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Infection and Immunity, Microbial Pathogenesis, Annals of Internal Medicine, Annals of Emergency Medicine, Microbes and Infection, Cellular Microbiology, FASEB Journal, Proceedings of the National Academy of Sciences.

3. Associate Editor- Pathogenesis, Anaerobe; 1999 - present.

**SPECIAL NATIONAL RESPONSIBILITIES:**

- 1978- Participant, NIH Conference on Clinical Efficacy of Amantadine in the Prevention of Influenza A (H<sub>1</sub>N<sub>1</sub>); National Institutes of Health, Bethesda, MD, August 3-4, 1978
- 1983-95 Member, Governor's Human and Animal Health Consortium, State of Idaho
- 1988-90 President, Idaho Thoracic Society
- 1989- CDC Working Group on Invasive Group A Streptococcal Infections
- 2001-04 Chairman, Infectious Diseases Society of America Guidelines Committee for Treatment of Skin and Soft Tissue Infections
- 2001-12 Idaho Epscor Committee
- 2004- Veterans Administration Career Development Award Study Section
- 2006- National Institutes of Health Scientific Review Board
- 2008- Chair, Military Relevance Clinical Trial Wound Care Peer Review Panel, Department of Defense. Reston VA
- 2010 Participant, NIH Study Section on Host-Pathogen Interactions, Washington DC.
- 2010-14 Chair, IDSA Guidelines Committee on Skin and Soft Tissue Infections.

**SPECIAL LOCAL RESPONSIBILITIES:**

- 1977-79 Chairman, Infection Control Committee, Brooke Army Medical Center
- 1979- Chairman, Infection Control Committee, Boise VA Medical Center
- 1979- Member Research and Development Committee, Boise VA Medical Center
- 1979- Member, Pharmacy and Therapeutics Agents Committee, Boise VA Medical Center

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- 1986-89 Clinical Executive Board, VA Medical Center, Boise, ID
- 1987-88 Chairman, Research and Development Committee, VA Medical Center, Boise, ID
- 2004-12 Associate Chief of Staff, Research and Development, VA Medical Center, Boise, ID

**RESEARCH FUNDING**

**A. Current Funding**

- 1. Cardiomyopathy in Strep TSS: Interplay of SLO and MMPs  
Veterans Administration; 10/01/2012-9/30/2016; \$600,000  
Role: PI

**B. Pending Funding**

- 1. Idaho Biomedical Research Collaborative in Emergin/Reemerging Infectious Disease  
NIH (NIGMS) COBRE Program; 7/01/15-6/30/20; \$7.5 million  
Role: PI and Program Director

**C. Recent Past Funding – 10 years**

- 1. Impact of Antibiotics on Expression of Virulence-associated Exotoxin Genes in Gram Pathogens  
NIH INBRE Program; 4/2009-3/2014; \$500,000  
Role: PI and Program Leader
- 2. Mechanisms of Cardiomyopathy in Streptococcal Toxic Shock Syndrome  
Veterans Administration Merit Review Program; 4/2008-3/2012; \$535,000  
Role: PI
- 3. Extension to evaluate the long-term effects of treatment with Peginterferon Alfa-2<sup>a</sup> or IFN-based therapies for patients with chronic hepatitis C.  
Clinical Trial: Roche; 4/2006-4/2011; \$2000/evaluable patient  
Role: PI
- 4. Comparative efficacy of iclaprim vs linezolid in complicated skin and soft tissue infections  
Clinical Trial: Arpida; 1/2007-1/2009; \$10,600/evaluable patient  
Role: PI
- 5. Toxin production in methicillin-resistant *Staphylococcus aureus*: the role of cell cycle, penicillin binding proteins, beta-lactam antibiotics and protein synthesis inhibitors

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- Pfizer, Basic Science Research Program; 6/2006-6/2008; \$432,000  
Role: PI
6. Comparison of azithromycin vs ceftriaxone in the treatment of community-acquired bacterial pneumonia.  
Clinical Trial: Pfizer; 3/1998-4/2008; \$2500/ evaluable patient  
Role: PI
  7. The role of NADase in invasive *Streptococcus pyogenes* infection.  
Veterans Administration Merit Review Program, 10/2001-9/2006; \$625,000  
Role: PI
  8. Efficacy of linezolid in an animal model of necrotizing fasciitis due to erythromycin-resistant group A streptococcus.  
Pfizer Basic Science Research Grant; 10/2005-9/2006; \$7,000  
Role: PI
  9. Effects of daptomycin on TSST-1, alpha hemolysin, and PVL production in *Staphylococcus aureus*.  
Cubist Basic Science Research Grant; 6/2005-5/2006; \$37,000  
Role: PI
  10. Suppression of toxins produced by community-acquired strains of methicillin-resistant *Staphylococcus aureus*  
Pfizer Basic Science Research Grant; 10/2004-9/2005; \$66,000  
Role: PI
  11. Innate immune recognition of, and response to, *Bacillus anthracis*.  
NIH Regional Center of Excellence Bioterrorism Program; 9/2003-2/2005; \$150,000  
Role: PI

**BIBLIOGRAPHY**

- A. Original Peer-reviewed Publications:
1. **Stevens DL, Strobel GA:** Origin of cyanide in cultures of a psychrophilic basidiomycetes. *J Bacteriol* 95(3):1094-1102, 1968.
  2. Pieroni RE, **Stevens DL**, Stojanovic A et al.: Investigation of cutaneous histamine sensitivity in children to pertussis. *Int Arch Allergy Appl Immunol* 41:940-944, 1971.
  3. Pieroni RE, **Stevens DL**, Stojanovic A et al.: Investigation of the responsiveness of BCG vaccinated children with whooping cough to tuberculin. *Int Arch Allergy Appl Immunol* 42(4):583-389, 1972.
  4. Everett ED, McNitt TR, Rahm AE, **Stevens DL** et al.: Epidemiologic investigation of methicillin resistant *Staphylococcus aureus* in a burn unit. *Milit Med* 143(3):165-167, March 1978.

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5. Everett ED, Rahm AE, Adaniya R, **Stevens** DL et al.: *Haemophilus influenzae* pneumonia in adults. JAMA 238(4):319-321, 1977.
6. **Stevens** DL, Everett ED: Sequential computerized axial tomography in tuberculous meningitis. JAMA 239(7):642, 1978.
7. **Stevens** DL, Haburchak D, Everett ED et al.: Group B streptococcal osteomyelitis in adults. South Med J 71(11):1450, 1978.
8. LaMontagne JR, Galasso GJ, **Stevens** DL et al.: From the National Institutes of Health: Report of a workshop on clinical studies of the efficacy of amantadine and rimantidine against influenza virus. J Infect Dis 138(6):928-931, 1978.
9. **Stevens** DL, Boxer LA, Everett ED et al.: Infectious mononucleosis with severe neutropenia and opsonic anti-neutrophil activity. South Med J 72(5):519-521, 1979.
10. **Stevens** DL, Taylor RG, Everett ED et al.: Amebic liver abscess: Report of a case presenting with nonreactive serologic tests for *Entamoeba histolytica*. Am J Gastroentrol 72(3):234-238, 1979.
11. **Stevens** DL, Higbee JW, Oberhofer TR et al.: Antibiotic susceptibilities of human isolates of *Pasteurella multocida*. Antimicrob Agents Chemother 16(3):322-324, 1979.
12. Kantor RJ, Potts DW, **Stevens** DL et al.: Prevention of influenza A/USSR/77 (H<sub>1</sub>N<sub>1</sub>): An evaluation of the side effects and efficacy of amantadine in recruits at Fort Sam Houston. Mil Med 145(5):312-315, 1980.
13. Price JC, **Stevens** DL: Hyperbaric oxygen and the treatment of rhinocerebral mucormycosis. Laryngoscope 90:737-747, 1980.
14. Craig DB, **Stevens** DL: Halophilic vibrio sepsis. South Med J 73:1285-1287, 1980.
15. Starkebaum G, **Stevens** DL, Henry C et al.: Stimulation of human neutrophil chemiluminescence by soluble immune complexes and antibodies of neutrophils. J Lab Clin Med 98(2):280-291, 1981.
16. Writer SL, **Stevens** DL, Starkebaum G: Chlorthalidone associated neutropenia. West J Med 136(1):59-61, 1982.
17. **Stevens** DL, Lieberman M, McNitt T, Price J: Demonstration of uronic acid capsular material in cerebrospinal fluid of a patient with meningitis caused by mucoid *Pseudomonas aeruginosa*. J Clin Microb 19(6):942-943, 1984.
18. Galgiani JN, Stevens DA, Graybill JR, **Stevens** DL, Tillinghast AJ, Levine HB: *Pseudallescheria boydii* infections treated with Ketoconazole. Chest 86(2):219-224, 1984.
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D. Other Publications:

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  109. Carvalho P, **Stevens DL**, Charan NB. Differential hemodynamic responses in gram-positive and gram-negative shock in a sheep model. American Thoracic Society annual meeting, 2005.
  110. **Stevens DL**, Bryant AE. Vascular dysfunction and ischemic destruction of tissue in *S. pyogenes* infection: The role of SLO-induced platelet/neutrophil complexes. The XVIth International Symposium on Streptococci and Streptococcal Diseases, Cairns, Australia, September 2005.
  111. Madaras-Kelly KJ, Remington R, Lewis P, **Stevens DL**. Evaluation of an intervention designed to decrease methicillin-resistant Staphylococcus aureus (MRSA) by limiting fluoroquinolone use. Abstract #K552. 45<sup>th</sup> ICAAC, Washington DC, December 2005.
  112. Bryant AE, Bayer CR, Aldape MJ, Wallace RJ, Titball RW, **Stevens DL**. *Clostridium perfringens* phospholipase C-induced platelet/leukocyte interactions impede neutrophil diapedesis. The 8<sup>th</sup> Biennial Congress of the Anaerobe Society of the Americas, Boise, ID, July 2006.
  113. Bryant AE, Hamilton SM, Bayer CR, **Stevens DL**. Group A Streptococcal Myonecrosis: Increased vimentin expression following skeletal muscle injury mediates the “flesh-eating” disease. The 88<sup>th</sup> annual meeting of the American Academy for the Advancement of Science, Pacific Division, Boise, ID, June 2007.

114. Wells SE, Huntington J, Katahira EJ, Ma YS, Hamilton SM, **Stevens DL**, Bryant AE. Group A Streptococcal Myonecrosis: Induction of C-C Chemokine Gene Expression in Human Skeletal Muscle Cells. Presented to the annual INBRE conference, University of Idaho, Moscow, ID, August 2007.
115. Ayoub A, Goodrich J, Gulick R, Heera J, Hoepelman A, Huyghe I, Maddrey W, Mayer H, van der Ryst E, **Stevens D**. The incidence of serious liver enzyme abnormalities in the Maraviroc phase I – 3 clinical development program. European AIDS Conference, Madrid Spain, October 2007.
116. **Stevens DL**, Shelly M, Stiller R, Villasenor-Sierra A, Bryant AE. Acute reversible cardiomyopathy in patients with streptococcal toxic shock syndrome. The XVIIth Lancefield International Symposium on Streptococci and Streptococcal Diseases, Porto Helo, Greece, June 2008.
117. **Stevens DL**, Russell K, Crum N, Aldape MJ, Bayer CR, Hale B, Hayes-Schroer SM, McIndoo E, Ma Y, Salmi DB, Bryant AE. An epidemic of M-type 3 GAS infections: Innate immune responsiveness is a function of the severity of infection. The XVIIth Lancefield International Symposium on Streptococci and Streptococcal Diseases, Porto Helo, Greece, June 2008.
118. Stevens DL. Cardiomyopathy in StrepTSS. 1<sup>st</sup> Annual Idaho INBRE Conference, Boise, ID, April 2009.
119. Parimon T, Bryant AE, **Stevens DL**. Exotoxins from community-acquired MRSA, other than Panton-Valentine Leukocidin, induce neutrophil activation and platelet binding. American Thoracic Society, International Conference, San Diego, CA. May 2009.
120. Turnbow C, Hamilton SM, McIndoo E, **Stevens DL**, Bryant AE. The Strep Connection: Molecular interactions between the microbe and its host. INBRE Research Conference, Aug 3 – 5, 2009, Idaho State University, Pocatello, ID.
121. Hamilton SM, Bayer CR, **Stevens DL**, Bryant AE. Muscle injury, vimentin expression and NSAIDs predispose to cryptic group A streptococcal myonecrosis. INBRE Research Conference, Aug 3 – 5, 2009, Idaho State University, Pocatello, ID. Winner, best Graduate Student Poster.
122. Thompson D, Bayer CR, Hamilton SM, Bryant AE, **Stevens DL**. The effects of a novel streptogramin antibiotic on TSST-1 toxin production by methicillin-resistant *Staphylococcus aureus* (MRSA).” INBRE Research Conference, Aug 3 – 5, 2009, Idaho State University, Pocatello, ID.
123. Wolter MJ, Ma Y, Bryant AE, **Stevens DL**. Regulation of streptococcal pyrogenic exotoxin B in response to environmental signals. Presented at the annual INBRE Research Conference, Aug 3 – 5, 2009, Idaho State University, Pocatello, ID.
124. Fitzgerald C, Li Z, Hamilton SM, **Stevens DL**. *Streptococcus pyogenes* induces RAGE ligand production in cardiomyocytes. Presented at the annual INBRE Research Conference, Aug 3 – 5, 2009, Idaho State University, Pocatello, ID.
125. Packham A, Aldape M, **Stevens DL**. The effects of antibiotic exposure on *C. difficile* growth and toxin A and B production. Presented at the annual INBRE Research Conference, Aug 3 – 5, 2009, Idaho State University, Pocatello, ID.
126. Parimon T, Bryant AE, Li Z, **Stevens DL**. Exotoxins from methicillin-resistant *Staphylococcus aureus* (MRSA) uniquely induce alveolar epithelial/pulmonary endothelial cell cross-talk. Abstract # 4967 Presented, American Thoracic Society annual

- meeting, New Orleans, LA. May 18-20, 2010. Am. J. Respir. Crit. Care Med.2010; 181: A4967.
127. Wilper AP, Weppner WG, Elgethun K, Mitten J, Tiumalu J, **Stevens DL**. Temporospacial surveillance of influenza-like-illness: Preliminary results from the Idaho Infectious Disease Reporting Network. International Society for Disease Surveillance (ISDS) Annual Conference 2010. Park City, UT. December 1-2, 2010. Abstract #489
  128. Weppner WG, Wilper AP, Mitten J, Tiumalu J, Tivis R, **Stevens DL**. Syndromic surveillance of influenza-like-illness using automated VA data: Preliminary results from the Idaho Infectious Disease Reporting Network. International Society for Disease Surveillance (ISDS) Annual Conference 2010. Park City, UT. December 1-2, 2010. Abstract #500
  129. Villaseñor-Sierra A, Katahira E, Jaramillo-Valdivia AN, Barajas-García MA, Morfín-Otero R, Márquez-Díaz F, Tinoco JC, Sánchez-Corona J, Bryant AE, **Stevens DL**. Phenotypes and genotypes of erythromycin resistant (ER) group A *Streptococcus* (GAS) strains isolated from invasive and non-invasive infections from Mexico and the USA during 1999-2009. Submitted, 111<sup>th</sup> Annual Meeting of the American Society for Microbiology, New Orleans, LA., May 21-24, 2011.
  130. Hamilton SM, Bayer CR, **Stevens DL**, Bryant AE. COX inhibition protects against cryptic group A streptococcal necrotizing infection in a murine eccentric contraction muscle injury model. Submitted, 111<sup>th</sup> Annual Meeting of the American Society for Microbiology, New Orleans, LA., May 21-24, 2011.
  131. Wiench C, McIndoo E, Li Z, **Stevens DL**, Bryant AE. Sub-inhibitory antibiotics change the immunogenic face of group A streptococcus. Presented at the annual Idaho INBRE Research Conference, Moscow, ID, August 1-3, 2011.
  132. Feichtinger SJ, Hamilton SM, Bayer CR, **Stevens DL**, Bryant AE. The role of antecedent influenza A virus infection in cryptic group A streptococcal myonecrosis. Presented at the annual Idaho INBRE Research Conference, Moscow, ID, August 1-3, 2011.
  133. Hasquet JC, Bryant AE, **Stevens DL**. *C. perfringens* toxins induce MMP production by skeletal and cardiac muscle cells. Presented at the annual Idaho INBRE Research Conference, Moscow, ID, August 2012.
  134. McIndoo E, Li Z, **Stevens DL**. SLO-induced cardiomyocyte toxicity and dysfunction. St. Luke's 2013 Research Symposium, Boise, ID. Feb 2013.
  135. Li Z, Bryant AE, Parimon T, **Stevens DL**. Cardiac dysfunction in StrepTSS: Group A streptococcus disrupts the directional cardiomyocyte-to-macrophage crosstalk that maintains macrophage quiescence. St. Luke's 2013 Research Symposium, Feb 2013.
  136. Bolz DD, Bryant AE, **Stevens DL**. *In vivo* molecular analysis of *Staphylococcus aureus* osteomyelitis pathogenesis. St. Luke's 2013 Research Symposium, Boise, ID. Feb 2013.
  137. Packham AE, Aldape MJ, **Stevens DL**. The effects of antibiotic exposure on *Clostridium difficile* growth and toxin A and B production. St. Luke's 2013 Research Symposium, Boise, ID. Feb 2013.
  138. Pollard HA, Aldape MH, **Stevens DL**. The *Clostridium sordellii* leukemoid reaction: Neuraminidase induction of anti-apoptosis signaling in promyelocytic cells. St. Luke's 2013 Research Symposium, Boise, ID. Feb 2013.
  139. Parimon T, Bryant AE, **Stevens DL**. Exotoxins from community-acquired MRSA, other

- than Panton-Valentine Leukocidin, induce neutrophil activation and platelet binding. St. Luke's 2013 Research Symposium, Boise, ID. Feb 2013.
140. Parimon T, Bryant AE, Li Z, **Stevens** DL. Exotoxins from methicillin-resistant *Staphylococcus aureus* (MRSA) uniquely induce alveolar epithelial/pulmonary endothelial cell cross-talk. St. Luke's 2013 Research Symposium, Boise, ID. Feb 2013.
  141. Hamilton SM, Bayer CR, **Stevens** DL, Bryant AE. Effects of selective and non-selective NSAIDs on initiation, progression and antibiotic efficacy of experimental group A streptococcal myonecrosis. St. Luke's 2013 Research Symposium, Boise, ID. Feb 2013.
  142. Hamilton SM, Bayer CR, **Stevens** DL, Bryant AE. Effects of selective and non-Selective NSAIDs on antibiotic efficacy of experimental group A streptococcal myonecrosis. 11<sup>th</sup> general meeting of the American Society for Microbiology, Denver, CO. May 2013.
  143. Parimon T, Bayer C, Bryant AE, **Stevens** DL. Post-influenza MRSA Pneumonia: A combination of antibiotic and antiviral is required as an effective therapy. Abstract 48714, American Thoracic Society International Conference, San Diego, CA. May 16-21, 2014.
  144. **Stevens**, D.L. Life-Threatening Toxin Mediated Clostridial Infections. 12<sup>th</sup> Biennial Congress of the Anaerobe Society of the Americas and 137<sup>th</sup> Congress of the Society for Microbial Ecology and Disease, Chicago, IL. June 28-July1, 2014.

INVITED LECTURESHIPS:

1. University of Utah, Nora Eccles Harrison Cardiovascular Research Institute. "Mechanisms of Shock Induced by Gram Positive Bacteria". Salt Lake City, Utah, December 1986.
2. The Upjohn Company. Guest speaker at the Annual Research and Development Meeting of the Division of Infectious Diseases. "Mechanisms of Bacterial Toxin Suppression by Antibiotics". Grand Rapids, Michigan, June 1987.
3. The University of Minnesota Divisions of Pediatric and Adult Infectious Diseases. 1) "Streptococcal myositis" and 2) "New Concepts in the Pathogenesis and Treatment of Gas Gangrene caused by *Clostridium perfringens*". Minneapolis, MN, November 1987.
4. Creighton University Division of Infectious Diseases. "Pathogenic Mechanisms in *Clostridium perfringens* Infection". Omaha, NB, February 1988.
5. University of Washington Department of Medicine Grand Rounds. "Current Concepts in the Pathogenesis and Treatment of Gas Gangrene caused by *Clostridium perfringens*". Seattle, WA, March 1988.
6. Veterans Administration Medical Center, Department of Medicine Grand Rounds. "New Concepts in the Pathogenesis of Gas Gangrene caused by *Clostridium perfringens*". Houston, TX, May 1988.
7. Baylor University Infectious Diseases Research Seminar. "Virulence Factors of *Clostridium perfringens*". Houston, TX, May 1988.
8. University of Texas at Galveston, Department of Medicine Grand Rounds. "New Concepts in the Pathogenesis and Treatment of Gas Gangrene caused by *Clostridium perfringens*". Galveston, TX, May 1988.

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9. International Symposium on the Interaction between Cefotaxime and Desacetylcefotaxime. Invited Speaker. "Evaluation of Positive Interactions Between Cefotaxime and Desacetylcefotaxime Using a Disc Susceptibility Assay". Dallas, TX, June 1988.
10. University of Oregon. Division of Infectious Diseases Visiting Professor. "Gas Gangrene". Portland, Oregon, July 1988.
11. University of North Dakota and Eighth Annual Infectious Disease Conference, Soft Tissue Infections, University of North Dakota and Bismarck Continuing Medical Education Council, Medora, North Dakota, August 1988.
12. Battelle Research Foundation, "The Role of Platelet Activating Factor in the Pathogenesis of Infectious Diseases". Richland, Washington, January 1989.
13. Cetus Corporation. "Mechanisms of shock induced by Gram positive bacteria". Emeryville, California, January 1989.
14. San Francisco General Hospital. Divisions of Clinical Pharmacology and Infectious Diseases, Research Seminar, "Effect of Inoculum Size on Antibiotic Efficacy: *In vitro* and *in vivo* Models of Streptococcal and Clostridial Infection". San Francisco, California, April 1989.
15. Veterans Administration Medical Center, San Francisco. "Pathogenic Mechanisms in *Clostridium perfringens* Infection". Research Seminar, Division of Infectious Diseases, San Francisco, California, April 1989.
16. University of Texas Medical Branch - Galveston. Consultant to the Marine Biology Hyperbaric Oxygen Unit, Galveston, Texas, April 17-21, 1989.
17. University of Texas Medical Branch - Galveston. "Mechanisms of Shock Induced by Gram Positive Bacteria". Research Seminar, Department of Microbiology, Galveston, Texas, April 18, 1989.
18. University of California, Davis. Visiting Professor. Medical Grand Rounds and Research Seminar, June 22, 1989. Topic: "Invasive Streptococcal Infections".
19. National Institutes of Health Symposium on Oxygen and Hyperbaric Oxygen Therapy. Invited speaker. "Oxygen and Hyperbaric Oxygen in the Treatment of Anaerobic Infections". Bethesda, Maryland, September 9-11, 1989.
20. University of Idaho. Graduate Research Seminar, Department of Bacteriology Biochemistry. "The Role of Exotoxins in the Pathogenesis of Gram Positive Infections". Moscow, Idaho, October 2, 1989.
21. University of Oklahoma Health Science Center. "The Role of Bacterial Exotoxins in the Pathogenesis of Gram Positive Infection". Department of Microbiology and Immunology, Oklahoma City, Oklahoma, October 16, 1989.
22. American Society of Microbiology, Northwest Branch meeting. "Pathogenesis of Gram Positive Infections". Moscow, Idaho, June 1990.
23. University of Washington Department of Medicine Grand Rounds. "Streptococcal Toxic Shock Syndrome". Seattle, Washington, December 13, 1990.
24. American Society of Microbiology Annual meeting. Symposium lecture: "The Streptococcal Toxic Shock Syndrome". Dallas, Texas, May, 1991.
25. Brown University. Visiting Professor. Medical Grand Rounds and Infectious Disease Research Seminar, May 22, 1991.
26. Interscience Conference on Antimicrobial Agents and Chemotherapy annual meeting.

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- Symposium lecture: "Streptococcal Toxic Shock Syndrome: Host defense vs. Streptococcal virulence factors". Chicago, IL, October, 1991.
27. Invited Lecturer. Immunex Corporation. "Gram Positive Shock". February 25, 1992, Seattle, Washington.
  28. Invited Lecturer, University of Zurich, "Toxic Streptococcal Syndrome". April 9, 1992, Zurich, Switzerland.
  29. Visiting Professor, Department of Surgery Grand Rounds; St. Judes Hospital Grand Rounds, University of Tennessee. April 18, 1992, Memphis, Tennessee.
  30. Invited Symposium Lecturer, American Society for Microbiology. "Scarlet Fever" New Orleans, May, 1992.
  31. 9th Lewis Wannamaker Lecturer. "Streptococcal Toxic Shock Syndrome: Pathogenic Mechanisms". University of Minnesota, May 1992.
  32. Invited Lecturer, North American Symposium on Anaerobic Infections. "Exotoxins of Clostridia". San Diego, California, July 1992.
  33. Invited Lecturer. "Virulence Factors of Group A Streptococcus". University of California, San Francisco, Napa Valley, July 1992.
  34. Invited Speaker: Annual Infectious Disease Symposium of Mexico. "Streptococcal Toxic Shock Syndrome". Huatulco, Mexico, October 1992.
  35. Visiting Professor: University of Maryland School of Medicine. "Streptococcal Toxic Shock Syndrome". Baltimore, Maryland, March 1993.
  36. Visiting Professor: UCLA. "Streptococcal Toxic Shock Syndrome". March 1993.
  37. Visiting Professor: University of Alabama. "Streptococcal Toxic Shock Syndrome." Birmingham, Alabama, April 1993.
  38. Invited Lecturer. Title-"Invasive Group A Streptococcal Infections." Annual Meeting of the Dutch Society of Microbiology. Utrecht, Holland, May 1993.
  39. Invited Lecturer. "The Role of Cytokines in Superantigen Related Illness." American Society for Microbiology Annual Meeting. Atlanta, Georgia, May 1993.
  40. Invited Lecturer: "Streptococcal Toxic Shock Syndrome: Mechanisms of Toxin Injury." Infectious Disease Association of California, 1993 Spring Symposium, Del Mar, CA., June 5, 1993.
  41. Participant: Roundtable Discussion on the role of Superantigen in Streptococcal Infections. XII Lancefield International Symposium on Streptococci and Streptococcal Diseases. St. Petersburg, Russia, Sept. 6-10, 1993.
  42. Participant: International Forum on Acute Bacterial Pharyngitis. "Significance of Pharyngeal Carriage of GAS." West Sussex, England, Sept. 11, 1993.
  43. Invited Lecturer: "Group A Streptococcal Infections: Clinical Presentations, Diagnosis and New Concepts of Treatment." St. Georges Hospital, London, England, Sept. 13, 1993.
  44. Invited Lecturer: Understanding Group A Streptococcal Infections in the 1990's. "Invasive Group A Streptococcal Infections: Past, Present, and Future." Annual Meeting, American Society of Pediatrics, Washington, D.C., Oct. 29, 1993.
  45. Invited Speaker: American College of Physicians, U. S. Army 10th Annual Scientific Meeting. "Invasive Streptococcal Infections." Orlando, FL., Nov. 18-20, 1993.
  46. Invited Speaker: Kuzell Institute Symposia. "Streptococcal Toxic Shock Syndrome". San Francisco, California, November 20, 1993.

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47. Participant: Oregon Health Sciences University, School of Medicine, Conference on Sepsis Syndromes. "Streptococcal and staphylococcal toxic shock syndromes: recognition, pathogenesis and treatment." Portland, OR., Dec. 9, 1993.
48. Invited Lecturer: State University of New York Health Science Center, New York State Department of Health. "Emerging issues with gram-positive cocci." New York, New York, Feb.4, 1994.
49. Invited Lecturer: "Soft Tissue Infections." Northwest Conference for Nurse Practitioners in Gerontology, University of Washington, School of Nursing, Office of Continuing Nursing Education. Seattle, Washington, March 24, 1994.
50. Invited Speaker: Idaho Thoracic Society, Annual Medical Symposium, Lung Disease Update. "Drug Resistant Tuberculosis." Boise, Idaho, March 25, 1994.
51. Invited Lecturer: "Group A Streptococcal Infections -- Past, Present, and Future." University of Texas Medical Branch at Galveston, Galveston, Texas, May 10, 1994.
52. Invited Lecturer: "The Resurgence of Virulent (Toxic) Streptococci." Grand Rounds, Providence Medical Center, Portland, Oregon, June 15, 1994.
53. Invited Lecturer: Workshop, Streptococcal Infections in the Military. Title- "Streptococcal Toxic Shock Syndrome: Clinical, Pathological and Laboratory Considerations." Department of the Army, U.S. Army Medical Research and Development Command, Fort Detrick, Frederick, Maryland, June 21, 1994.
54. Invited Testimony on Invasive Group A streptococcal infections. Congress of the United States, House of Representatives, Committee on Government Operations, Subcommittee on Human Resources and Intergovernmental Relations, Washington, D.C., July 28, 1994.
55. Visiting Professor: University of Umea. Title: "Clinical Presentation and Pathogenic Mechanisms in Group A Streptococcal Infections." Umea, Sweden, September 30, 1994.
56. Consultant: National Institutes of Health Symposium on Streptococcal Infections. Bethesda, Maryland, November 1994.
57. Consultant: The United Nations World Health Organization Symposium on Streptococcal Toxic Shock Syndrome. Geneva, Switzerland, December 1994.
58. Invited speaker: American College of Physicians annual scientific Meeting. Seattle, Washington, December 1994.
59. Invited Speaker: The 8th Kurhaus Workshop on Infectious Diseases. Title: "Clinical Presentation and Treatment of Serious Streptococcal Infections." The Hague, Holland, December 16, 1994.
60. Invited speaker and organizer: ASM First International Conference on the Molecular Genetics and Pathogenesis of the Clostridia. Rio Rico, Arizona, January 10-14, 1995.
61. Invited Speaker: University of California, Davis, Annual Infectious Disease Conference. Sacramento, California, February 3, 1995.
62. Invited Speaker: The 7th European Congress of Clinical Microbiology and Infectious Diseases. Title: "Streptococcal Toxic Shock Syndrome." Vienna, Austria, March 1995.
63. Invited lecturer: The University of Zurich, Annual Infectious Disease Conference. Title: "Flesh-Eating Bacteria." Zurich, Switzerland, March 1995.
64. Invited speaker: Annual Meeting of the American Society of Microbiology, Emerging Pathogens Symposia. Title: "Streptococcal Toxic Shock Syndrome." Washington, D.C., May 1995.
65. Invited lecturer: Second Annual Alaskan Infectious Disease Conference. Title: "Severe

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- Group A Streptococcal Infections: New Concepts in Pathogenesis and Treatment." Seldovia, Alaska, June 1995.
66. Invited Speaker and Symposium Chairman, Serious Streptococcal Infections: 19th International Congress of Chemotherapy, Montreal, Quebec, Canada, July 16-21, 1995.
  67. Invited speaker and co-chair: 20th Annual Meeting of the Japanese Society for Investigative Dermatology, Symposia on Severe Group A Streptococcal Infections. Okayama, Japan, September 1995.
  68. Symposium Co-Chairman: "Invasive Group A Streptococcal Infections", Interscience Congress on Antimicrobial Agents, San Francisco, CA September 1995.
  69. Invited Speaker, The 1995 Harold Neu Infectious Diseases Conference. "Invasive Streptococcal Infections". Toronto, Canada, October 1995.
  70. Invited participant. The Centers for Disease Control meeting on the Prevention of Invasive Group A Streptococcal Infections, Atlanta, GA October 1995.
  71. Invited Speaker, X Congreso CentroAmericano de Microbiologia, and the X Congreso Nacional de Microbiologia, Parasitologia y Patologia Clinica, in San Jose, Costa Rica, November 1995.
  72. Visiting Professor, Medicine Grand Rounds. Louisiana State University. Group A Streptococcal Infections. January 4, 1996, New Orleans, LA.
  73. Visiting Professor, Medicine Grands Rounds, Wayne State University. Streptococcal Toxic Shock Syndrome. Detroit, MI. January 10, 1996.
  74. Visiting Professor, Medicine Grand Rounds, Brooke Army Medical Center. Severe Group A Streptococcal Infections. San Antonio, TX. January 25-26, 1996.
  75. Invited Lecture, University of California at San Francisco Symposium on Emerging Pathogens. San Francisco, CA. January 20, 1996.
  76. Invited Speaker. University of Umea. Streptococcal Toxic Shock Syndrome. Umea, Sweden. February 5, 1996.
  77. Invited Speaker. Uppsala University. Streptococcal Toxic Shock Syndrome. Uppsala, Sweden. February 6, 1996.
  78. Invited Speaker. Bergen University Hospital. Streptococcal Toxic Shock Syndrome. Bergen, Norway. February 7, 1996.
  79. Invited Speaker. Oslo University. Streptococcal Toxic Shock Syndrome. Oslo, Norway. February 7, 1996.
  80. Invited Speaker. Gothenburg University East Hospital. Streptococcal Toxic Shock Syndrome. Gothenburg, Sweden. February 8, 1996.
  81. Invited Speaker. Lund University Hospital. Streptococcal Toxic Shock Syndrome. Lund, Sweden. February 9, 1996.
  82. Invited Speaker. Albert Einstein College of Medicine and the Montefiore Medical Center. Streptococcal Toxic Shock Syndrome. Bronx, NY. March 6, 1996.
  83. Invited Speaker. University of Nurnberg. Invasive Group A Streptococcal Infections. Diagnosis, Pathogenesis and New Concepts in Treatment. Nurnberg, Germany, March 12, 1996.
  84. Invited Speaker. Munster University. Invasive Group A Streptococcal Infections. Diagnosis, Pathogenesis and New Concepts in Treatment. Munster, Germany. March 14, 1996.
  85. Invited Lecture. International Symposium on Infectious Diseases in Otorhinolaryngology

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- Lecture: Streptococcal Infections of the Head and Neck. Bochum, Germany. March 16, 1996.
86. Featured Speaker. Streptococcal Toxic Shock Syndrome. James F. Hammersten Day, University of Oklahoma, Oklahoma City, OK, March 20, 1996.
  87. Invited Speaker. Rocky Mountain Infection Control Association. "Group A Strep - The Flesh Eater". Salt Lake City, UT. April 3, 1996.
  88. Distinguished Presenter. International Infectious Disease Society for Obstetrics and Gynecology, First Annual Meeting. "Group A Streptococcal Toxigenicity". Boulder, CO. April 28, 1996.
  89. Invited Speaker. "The Flesh-eating Bug: Diagnosis and Treatment of Strep". Medicine in the Intermountain West Symposium, LDS Hospital, Salt Lake City, UT May 3, 1996.
  90. Invited Speaker. "Streptococcal Necrotizing Fasciitis". Magic Valley Regional Medical Center. Twin Falls, ID. May 10, 1996.
  91. Invited Speaker, 13th Annual Convocation on Immunology, Immunological and Molecular Diagnosis of Infectious Diseases, "The Toxins of Group A Streptococcus", University of Buffalo, Buffalo, NY, June 1-5, 1996.
  92. Invited Speaker, "Update on Streptococcal Infections", 10th Annual Triservices Infectious Disease Symposium, Panama City, June 4-7, 1996.
  93. Invited Speaker, "Pathogenesis of Clostridial Infections", Anaerobe Society of the Americas Congress on Anaerobic Bacteria and Anaerobic Infections, Chicago, IL, July 19-21, 1996.
  94. Invited Speaker, Avance en Medicina Critica, Organiza Unidad de Terapia Intensiva, "Streptococcal Toxic Shock Syndrome" and "The Role of Cytokines in Bacterial Shock", Quito, Ecuador, July 6-9, 1996.
  95. Medical Grand Rounds, University of Utah College of Medicine, "Invasive Group A Streptococcal Infections", Salt Lake City, Utah, December 12, 1996.
  96. Invited Speaker, Sixth Forum on Infectious Diseases, University of Zurich, "The Pathogenesis of Group A Streptococcal Infections", Switzerland, January 24,25, 1997.
  97. Invited Speaker, 6th Annual International Pediatric Infectious Diseases Conference, "Streptococcal Toxic Shock Syndrome", Banff, Canada, February 8-10, 1997.
  98. Invited Speaker, 20th Annual Update in Clinical Microbiology and Immunology, "Group A Streptococcal Infections", Park City, Utah, March 2-7, 1997.
  99. Invited Speaker, 71st Annual Meeting of the Japanese Association for Infectious Diseases, "New Aspects of Streptococcal Infections", Sapporo, Japan, April 3-4, 1997.
  100. Medical Grand Rounds, University of Washington School of Medicine, "Invasive Group A Streptococcal Infections", Seattle, Washington, April 9, 1997.
  101. Keynote Address, Second International Meeting on the Molecular Genetics and Pathogenesis of the Clostridia, "The Pathogenesis of Clostridial Myonecrosis", Onzain, France, June 22-25, 1997.
  102. Invited speaker, IX European Meeting on Bacterial Toxins, "The Pathogenesis of Clostridium perfringens infections", Ste. Maxime, France, June 28 - July 3, 1999.
  103. Pfizer Visiting Professorship. University of Utah School of Medicine, Departments of Obstetrics and Gynecology, and General Surgery, April 13-15, 1999.
  104. Grand Rounds, Department of Medicine, University of Illinois. "Streptococcal Toxic Shock Syndrome", Chicago, IL, June 10, 1999.

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105. Invited Speaker, Interscience Conference of Antimicrobial Agents and Chemotherapy, “Gram Positive Shock”, San Francisco, CA, October 1999.
106. Participant, CDC Working Group on Severe Streptococcal Infections (StrepTSS), Atlanta, GA, October 1999.
107. Invited Speaker, Universidad Autonoma de Guadalajara Infectious Disease Symposium on Gram Positive Infections, “Streptococcal Infections”, Guadalajara, Jalisco, Mexico, January 2000.
108. Grand Rounds, University of Oregon, Department of Medicine, “Gram Positive Infections”, Portland, OR, April 2000.
109. Invited Speaker, 48<sup>th</sup> Annual meeting of the Japanese Society of Chemotherapy. “Invasive group A streptococcal infections”, Okayama, Japan, June 1-2, 2000.
110. Grand Rounds, University of Colorado, Department of Medicine, “Group A Streptococcal Infections”, Denver, CO., January 2001.
111. Invited Speaker, Bay Area Infectious Disease Society, “Streptococcal Infections”, San Francisco, CA, February 2001.
112. Invited Speaker, University of California Symposium, Epidemiology of Infectious Diseases, “Invasive Group A Streptococcal Infections”, San Francisco, CA, February, 2001.
113. Invited Speaker, Norwegian Surgical and Intensive Care Society Annual Meeting, “Invasive Streptococcal Infections”, Oslo, Norway, February 2001.
114. Grand Rounds, West Los Angeles Veterans Affairs Medical Center, “Necrotizing Soft Tissue Infections”, Los Angeles, CA., March 2001.
115. Invited Speaker, University of Washington School of Medicine, “Streptococcal Toxic Shock Syndrome”, Seattle, WA., April 2001.
116. Invited Speaker, The State University of New York at Buffalo, School of Medicine and Biomedical Sciences, Infectious Diseases Division, “Streptococcal Infections”, Buffalo, NY., April 2001.
117. Invited Speaker, Creighton University School of Medicine 21<sup>st</sup> Annual Infectious Diseases Symposium, “Streptococcal Toxic Shock Syndrome”, Omaha, NE, April 2001.
118. Invited as the Keynote William Altemeier Lecturer, Surgical Infections Society, “Soft Tissue Infections”, Snowbird, UT, May 2001.
119. Visiting Professor, Wilford Hall Medical Center and Brooke Army Medical Center, “Streptococcal Infections”, San Antonio, TX, September 2001.
120. Invited Speaker, XIII Jornada Nacional de Infectologia (XIII Infectology National Meeting), Skin and Soft Tissue Infections, October 18 - 20, 2001, Caracas, Venezuela.
121. Visiting Professor, Kaiser Permanente, Departments of Surgery and Medicine, “Group A Streptococcal Infections”, Santa Clara, CA, November 2001.
122. Invited Speaker and Participant, *Bacillus anthracis* Bioterrorism Research Priorities for Public Health Response, Centers for Disease Control and Prevention, Atlanta, GA, December 11-12, 2001.
123. Invited Speaker, American College of Physicians, US Army Chapter, “Group A Streptococcal Infections”, San Antonio, TX, November 2001
124. Medical Grand Rounds and Invited Speaker, “Current Concepts in Gram Positive Infections, Christiana Health Care System/Medical Society of Delaware, Newark, Delaware, January 2002.

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125. Medical Grand Rounds, Medical College of Pennsylvania, Philadelphia, PA, January 2002.
126. Invited Speaker, "Effect of MASKO Compounds in Exotoxin-Mediated Diseases, ICMASKO Meeting, Bologna, Italy, January 2002.
127. Invited Speaker, "What's New for Gram Positive Infections", Society for Critical Care Medicine, Annual Conference, San Diego, CA, January 2002.
128. Medical Grand Rounds, "Group A Strep and Toxic Shock Syndrome", Maine Medical Center, Portland, Maine, March 2002.
129. Invited Speaker "Group A Streptococcal Infections and Streptococcal Toxic Shock Syndrome" and Medical Grand Rounds, Shady Grove Adventist Hospital, Rockville, MD., June 2002.
130. Invited Speaker "*Clostridium perfringens* Gas Gangrene: Ancient Nemesis, Modern Concepts" Anaerobe Society of the Americas, Park City, UT, June 2002.
131. Infectious Diseases Grand Rounds, "Serious Gram Positive Infections: Diagnosis, Pathogenesis, and Treatment". Department of Internal Medicine, University of Michigan, Ann Arbor, MI., September 2002.
132. 18<sup>th</sup> Annual Harold D. Rose, M.D., Memorial Lecturer. "Streptococcal Toxic Shock Syndrome". Medical College of Wisconsin, Division of Infectious Diseases, Milwaukee, WI, September 2002.
133. Invited Speaker, 5<sup>th</sup> Bernese Infectious Diseases Symposium, Bern, Switzerland, October 2002.
134. Invited Speaker, 8<sup>th</sup> Annual Western Pacific Congress on Chemotherapy and Infectious Diseases, Perth Australia, December 2002.
135. Invited Speaker: "The Role of Antimicrobial Tissue Penetration, Cytokine Activation, Immunomodulation and Toxin Production in Serious Soft Tissue Infections", 41<sup>st</sup> Annual Infectious Diseases Society of America meeting, San Diego, CA, October 2003.
136. Grand Rounds. Temple University, Philadelphia, PA. Serious Gram Positive Soft Tissue Infections, February 2004.
137. Invited Speaker: "Soft Tissue Infections: Increasing Virulence and Emerging Resistance in the New Millennium". Spokane Infectious Diseases Symposium, Spokane, WA., February 2004.
138. Invited Speaker: "Soft Tissue Infections and Case Presentations", Montana State University, Department of Microbiology, Bozeman, MT, February 2004.
139. Grand Rounds: "Skin and Soft Tissue Infections", SUNY, Department of Medicine, Syracuse, NY, March 2004.
140. Invited Speaker: "Demystifying the Research: What the clinician needs to know about resistance". 11th International Congress on Infectious Diseases, Cancun, Mexico, March 2004.
141. Invited Speaker: "Skin and Soft Tissue Infections", Idaho Academy of Physicians Assistants annual conference, Sun Valley, ID, April 2004.
142. Grand Rounds: "MRSA Infections: Epidemiology, Virulence Factors and Treatment Options", William Beaumont Hospital, Royal Oak, MI, April 2004.
143. Invited Speaker: "Clinical Spectrum and Treatment of Community Acquired Staphylococcus aureus Infections", National Foundation for Infectious Diseases (NFID) 2004 Annual Conference on Antimicrobial resistance, Bethesda, MD., June 2004.

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144. Grand Rounds: "MRSA Infections", Ada County Medical Education, Boise, ID., July 2004.
145. Invited Speaker: "MRSA Infections", Northwest Lung Conference, St. Luke's Hospital, Boise, ID, August 2004.
146. Invited Speaker: "Tissue Penetration, Cytokine Activation and Immunomodulation: Markers of Efficacy", Satellite Symposium for the Infectious Diseases Society of America annual meeting, Boston, MA., September 2004.
147. Invited Speaker: "Pathophysiology and Therapeutics of Skin Structure Infections", Idaho State University, College of Pharmacy Integrated Therapeutics Course, Pocatello, ID, September 2004.
148. Invited Speaker: "MRSA Infections and Treatment", Brooke Army Medical Center, Department of Medicine, San Antonio, TX, October 2004.
149. Grand Rounds: "Necrotizing Soft Tissue Infections: Clinical Spectrum and New Insights into Pathogenesis", Brooke Army Medical Center, Department of Medicine, San Antonio, TX, October 2004.
150. Invited Speaker: "Pharmacodynamic Issues that Influence Antimicrobial Choices", Society of Critical Care Medicine annual meeting, Phoenix, AZ, January 2005.
151. Grand Rounds: "Update on Antibiotic-resistant Nosocomial Infections and Community Acquired Pneumonia", Magic Valley Regional Medical Center, February 2005.
152. Invited Participant: Symposium on "Evaluating Strategies to Improve Patient Outcomes: Community-acquired and Healthcare-associated MRSA Infections". American College of Surgeons Clinical Congress, San Francisco, October 2005.
153. Invited Participant: Infectious Diseases Society of America Satellite Symposium: "The Impact of Multi-drug Resistant MRSA Infections in the ICU", San Francisco, October 2005.
154. Medical Grand Rounds: "Group A Streptococcal Infections", University of Maryland Department of Medicine, Baltimore, MD, November, 2005.
155. Symposium participant: "Toxin inhibition and inactivation: Novel strategies in the treatment of staphylococcal infection". Presented in a symposium entitled: "Is staphylococcal sepsis a toxinosis?". 45<sup>th</sup> annual ICAAC meeting, Washington, D.C., December 2005.
156. Symposium participant: "Minimizing resistance, maximizing efficacy: A closer look at toxin production and antibiotic cycling". Presented in a symposium entitled: "Evaluating strategies to reduce antimicrobial resistance and improve patient outcomes". 35<sup>th</sup> annual Society of Critical Care Medicine's Critical Care Congress, San Francisco, CA, January 2006.
157. Invited Speaker: "*Clostridium sordellii*: Clinical settings, diagnostic clues and pathogenic mechanisms". Joint CDC/NIH/FDA workshop on Emerging Clostridial Diseases, Atlanta, GA, May 2006.
158. Medical Grand Rounds: Catastrophic anaerobic infections. Loyola University, Chicago, IL, Nov 2006.
159. Invited Participant: 25<sup>th</sup> Annual Infectious Diseases Conference, University of California Davis, Sacramento, CA, Jan 2007.
160. Visiting Professor: "Community Acquired MRSA", University of Texas Southwestern, Division of Infectious Diseases, April 2007.

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161. Invited Symposium Lecture. “Catastrophic Clostridial Infections”, American Society of Microbiology, Toronto, Canada. May 2007.
162. Medical Grand Rounds: Update on MRSA. St. Vincent Medical Center, Los Angeles, CA. May 2007.
163. Invited Speaker: Idaho Medical Association meeting, Coeur d’Alene, ID. Aug 2007.
164. Invited Speaker: MRSA in the Surgical Setting. American College of Surgeons annual meeting, New Orleans, LA. Oct 2007.
165. Invited Speaker: CDC Group A Life threatening necrotizing fasciitis meeting, Atlanta, GA. Nov 2007.
166. Invited Speaker: Update on MRSA. Annual Infectious Diseases Symposium, Tacoma WA. Nov 2007.
167. Medicine Grand Rounds: Life threatening Gram positive infections. University of Colorado Health Sciences Center, Denver, CO. Jan 2008.
168. Invited Lecture: The role of toxin suppression in the treatment of Gram positive infections. Arizona Infectious Diseases Society meeting. Sedona, AZ. Apr 2008.
169. Medicine Grand Rounds: Update on MRSA. Columbia University School of Medicine, New York City, NY. May 2008.
170. Faculty and Invited Lectures (3): Remington Winter Course, Sun Valley, ID. May 2008.
171. Invited Lecture: Update on MRSA. University of Oregon Health Science Center, Portland, OR. May 2008.
172. Invited Lecture: Acute reversible cardiomyopathy in patients with streptococcal toxic shock syndrome. The XVIIth Lancefield International Symposium on Streptococci and Streptococcal Diseases. Porto Helo, Greece, July 2008.
173. Invited Lecture: An epidemic of M-type 3 GAS infections: Innate immune responsiveness is a function of the severity of infection. The XVIIth Lancefield International Symposium on streptococci and Streptococcal Diseases. Porto Helo, Greece, July 2008.
174. Invited Lecture: Infectious Diseases Association of California, Longbeach. Life threatening group A streptococcal infections. Longbeach, CA., Sept 2008.
175. Invited Lecture: The effect of combinations of antibiotics on toxin expression in MRSA. Infectious Diseases Society of America/Interscience Conference on Antimicrobial Agents and Chemotherapy annual meeting. Washington, DC. Oct 2008.
176. Invited Participant: Life threatening anaerobic infections. Colorado Association for CME. Nov 2008.
177. Invited Lecture: Group A streptococcal infections. New Orleans Citywide Infectious Diseases Society meeting. New Orleans, LA. Feb 2009.
178. Keynote Speaker: Update on MRSA. Southern Society of Infectious Diseases annual meeting. New Orleans, LA. Feb 2009.
179. Invited Lecture: Invasive group A streptococcal infections. Royal College of Physicians Endowed Lectureship. Edinburgh, Scotland. June 2009.
180. Invited Speaker: Catastrophic Clostridial Infections. IDSA annual meeting, Philadelphia, PA. October 2009.
181. Invited Speaker: Update on Streptococcal Necrotizing Fasciitis. IDSA annual meeting, Philadelphia, PA. October 2009.
182. Invited Speaker: Gram Positive Infections. South Carolina Infectious Diseases Society

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- annual meeting, Columbia, SC. January 2010.
183. Invited Speaker: “Sindrome de Choque Toxico (Toxic Shock Syndrome)”. 35<sup>th</sup> Congreso Annual de la Asociacion Mexicana de Infectologia y Microbiologia Clinica, A.C. (35<sup>th</sup> Annual Congress of the Mexican Association of Infection and Clinical Microbiology), Veracruz, Ver., Mexico. 26-29 May 2010.
  184. Invited Speaker. 10<sup>th</sup> Biennial Congress of the Anaerobe Society of the Americas, Philadelphia, PA. July 7-10, 2010.
  185. Invited Speaker. Impact of antibiotics on expression of virulence-associated exotoxin genes in Gram positive pathogens. Idaho INBRE 9<sup>th</sup> Annual Research Conference, Moscow, ID. August 2-4, 2010.
  186. Invited Speaker: Meet the Experts session: “Staph and Strep Toxic Shock Syndromes: An Update”, 50<sup>th</sup> annual ICAAC meeting, Boston, MA, Sept 12-15, 2010.
  187. Invited Speaker: “Invasive Group A Streptococcal Infections”, Department of Veterinary Molecular Biology, Montana State University, Bozeman, MT, Sept 28, 2010.
  188. Medical Grant Rounds, 2010 Dowling Day Lecture Series, University of Illinois at Chicago College of Medicine, “Invasive Group A Streptococcal infections, November 9, 2010.
  189. Infectious Diseases Seminar, 2010 Dowling Day Lecture Series, University of Chicago College of Medicine, “Gram positive toxins: How they kill you and what you can do about it!”, November 9, 2010.
  190. Invited Speaker: Unusual Presentations of Streptococcal Infections. IDSA, San Diego, October 2012.
  191. Invited Speaker: Step Down Treatment of Severe Group A Streptococcal Infections, University of Manitoba, Canada, Winnipeg Canada, Sept 2012.
  192. Invited Speaker: Life-Threatening Toxin Mediated Clostridial Infections. 12th Biennial Congress of the Anaerobe Society of the Americas and 137th Congress of the Society for Microbial Ecology and Disease, Chicago, IL. June 28-July 1, 2014.

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August 12, 2015

Dr. Larid Noh, Chair  
Idaho EPSCoR Committee  
875 Perimeter Dr.  
MS 3029  
Moscow, ID 83844-3029

Dear Dr. Noh:

Thank you for your patience and willingness to provide information to me on the Idaho Experimental Program to Stimulate Competitive Research. I am a bit careful when I make these decisions as I do not agree to handle new responsibilities unless I can give 100%.

After reviewing the publication you provided and our conversations, I am excited for the opportunity to be a part of EPSCoR and to add my efforts in promoting competitive research within our Universities. During my time in the legislature, I have always had a burning desire to promote education and have been particularly active in this area in my last three years serving on the Joint Finance Committee. The Education Budget has been one of my focuses for the last three years and I feel I have had some influence on the outcomes – not always getting everything I wanted, but being pleased with the progress that is being accomplished. Additionally, the opportunity to work with Representative Bell in this endeavor is another motivating factor in my application.

I will bring some diversity to the committee. I am a grandson of immigrants and began working full time at age 13. I have experience with large companies (Union Pacific), small business (Roy's Western Wear) and non-profit (The Idaho Foodbank). Also, my focus and experience on the Joint Finance Committee gives me the background to hopefully help attain the goals of EPSCoR.

Your confidence in me for the nomination to be on the EPSCoR committee is greatly appreciated and please know that if I am appointed you can be sure you will have my complete support.

Yours truly,  
/s/ Roy Lacey

Roy Lacey, Senator  
District 29

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**BIO FOR ROY LACEY**

While Roy's official status is retired, he was elected in November 2010 to represent Pocatello in the House of Representatives, Idaho State Legislature and in 2012 and 2014 was elected to the Senate and currently is completing year six in these capacities. Roy has been privileged to serve on several committees which include Agriculture, Resources and Conservation, Joint Finance Committee, Transportation, Local Government and Tax and for a brief time was on the Health and Welfare Committee. Additionally has or is serving on interim committees (meet during the summer months) Education Task Force, Hispanic Affairs, Governors Housing, Resource and Conservation, Food Safety Committee and possibly a few more.

Roy retired from the position as Vice President of Operations for The Idaho Foodbank in July 2012. His responsibilities included warehouse operations for all three branches (Pocatello, Boise and Lewiston), statewide Children's Nutrition Services Programs (after school snack and backpack programs) and the Agency and Outreach areas of the organization. Roy began his service to The Idaho Foodbank in November 1997 establishing the Foodbank in Pocatello. He was later given the responsibility for the Lewiston and Pocatello Foodbank facilities before moving to vice president position in March 2008. From December 2008 to May 2009 he served as Interim President of the Idaho Foodbank. Before joining The Idaho Foodbank, Roy spent 25 years working for Union Pacific Fruit Express beginning as a stenographer and ending his railroad career as Senior Manager of Perishable Operations.

Roy is also an experienced businessman who owned and operated a Western store in Pocatello before joining the Foodbank. His presence in the nonprofit world extends to his service on the Board of Directors for Idaho Non-Profit Center and membership in the Pocatello Rotary Club, Greater Pocatello Chamber of Commerce and the Pocatello Chiefs.

Roy has been married to his lovely wife, Renee, for 46 years and has four children and 14 grandchildren.

**Gynii Abracosa Gilliam**

210 East Sherman, Suite 206 \* Coeur d'Alene, Idaho 83814  
E-mail: [gyniigilliam@gmail.com](mailto:gyniigilliam@gmail.com) \* Cell: 1.208.756.7889

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July 26, 2015

Dr. Laird Noh, Chair  
Idaho EPSCoR Committee  
875 Perimeter Dr. - MS 3029  
Moscow, ID 83844-3029  
*Re: State Committee, EPSCoR*

Dear Chairman Noh,

Thank you very much for the call from Doyle Jacklin regarding continuing to serve on the Idaho EPSCoR Committee. I would be very interested in continuing to serve on the State Committee. I truly believe that this program helps less populated states and smaller universities increase their capacity for Federal research.

As one of the economic development professionals in the state, I know that the work of our researchers and our assistance as the state committee helps bring jobs and R&D dollars to Idaho. These efforts help us improve both student interest in STEM education and helps us grow our science and technology sector. From a personal perspective, science has always been an interest and a passion, having begun my undergraduate education as a biochemistry major; though eventually switching to economics and development.

I would be honored to continue to serve on the state committee and feel that I can continue to contribute through my professional work.

Respectfully,



Ms. Gynii A Gilliam

## Gynii Abracosa Gilliam

210 East Sherman, Suite 206 \* Coeur d'Alene, Idaho 83814  
E-mail: [gyniigilliam@gmail.com](mailto:gyniigilliam@gmail.com) \* Cell: 1.208.756.7889

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### Education

- Master of Urban and Regional Planning, University of Michigan, Ann Arbor; Rackham Graduate School of Architecture and Planning Fellowship
- Bachelor of Arts in Political Science, University of California, Los Angeles; California State Scholarship; and Presidential Classroom Scholarship for a Comparative Government Study at the University of Copenhagen, Denmark

### Professional Experience

#### **Summary of Economic Development and Management Skills**

##### **Project Management**

- Directed day-to-day project management, providing a *one-stop-shop* for clients, from proposal preparation, to real estate searches & negotiations, incentive assistance, workforce review, to aid with permitting and public/media relations. Past projects include: Allstate recruitment, Farmers Insurance expansion, and ISU's RISE Complex development.
- Managed project pipelines for Lemhi/Custer ED (25+), Bannock Development (75+) and Idaho Commerce (100+). Projects ranged from assisting small, rural businesses to retaining/expanding operations of global giants like ON Semiconductor and McCain Foods. Pipeline management included ensuring a flow of new leads from trade shows, businesses, chambers and other sources.
- Established strong partnerships at the local, regional and state levels, partnering with neighboring communities, counties, colleges, business centers, and other organizations/agencies to improve collaboration and cooperation. Regular partner meetings resulted in more efficient responses to business needs, better coordinated site/business visits and improved workforce programs.

##### **Public Relations, Communications and Marketing**

- Launched public information programs to encourage public support and engagement locally, as well as disseminate knowledge about Idaho nationally by participating in and speaking at annual conferences and events, such as state/regional industry associations (i.e., real estate, agriculture, retail, manufacturing, mining, etc.), city/county organizations, the Council of State Governments, National Governor's Association, and Int'l Economic Development Council.
- Improved internal and external marketing programs, including: updating websites, social media outreach and collateral materials; initiating new events (e.g., funder's reception, industry sector breakfasts) and revamping existing ones (e.g., annual summit); and, increasing the frequency of materials highlighting area successes, trends and strengths in both local and national journals.

##### **Operations and Financial Management**

- Improved program success rate by developing strong short and long term strategic plans, incorporating the latest trends in entrepreneurial development, business attraction-retention-expansion, international trade and organizational management to better integrate teamwork to focus on project completion and customer service, enhance community and partner outreach, as well as encourage leadership development.
- Prepared annual budgets and fundraising plans, including identifying new private, state and federal funding programs to meet goals and objectives. Annual Operating Budgets: Custer & Lemhi County ED -\$150,000 (including business center operations), BDC -\$300,000, and Idaho Commerce -\$9 million for operations and personnel, plus \$16 million in state and federal grants. At BDC, refining fundraising efforts resulted in an 18 month operations reserve.

## Employment History

### **President, Coeur d'Alene Area Economic Development Corporation (Jobs Plus)**

Coeur d'Alene, Idaho; March 2015-Present

#### **Key Responsibility:**

- Lead the region's economic development team to help businesses create new jobs by: 1) helping local business with retention and expansion; 2) attracting new businesses into the region to strengthen existing industries and diversify the economy; 3) partnering with existing organizations to help new business start-up; as well as 4) ensuring the workforce has the necessary skills and training for the new jobs.

### **President & CEO, Gilliam & Company (G2LLC)**

Boise, Idaho; January 2014-March 2015

Established Gilliam & Company to provide consulting services in all aspects of economic, community, and business development.

#### **Projects include:**

- Presenting an economic development (ED) training program designed for elected officials, boards and other stakeholders to provide context to the ED process –focusing on best practices, excellent customer service, and great teamwork for better success in business and job creation efforts.
- Facilitating strategic planning meetings for various non-profit organizations. Clients include WOCA, an organization helping empower disadvantaged women in Idaho; the Meridian Education Foundation, and an NGO working in coastal communities in Guatemala.
- Collaborating with corporate realtors to explore the development of stronger partnerships between economic development agencies and the corporate real estate industry to provide full-service assistance to site selection firms and businesses looking for expansion sites.

### **Adjunct Faculty, Boise State University, Community and Regional Planning Department**

Boise, Idaho; January 2013-Present

Teaching a graduate course in *State, Regional, and Local Economic Development*. Class covers: elements and foundation (history, rationale, current activities, and trends); strategies and methodologies (business creation, retention/expansion, attraction, and cluster/innovation development); and, tools and resources (workforce development, higher education, public policies, anchor institutions, and data sources).

### **Chief Economic Development Officer, Idaho Department of Commerce**

Boise, Idaho; January 2012-November 2013

#### **Key accomplishments include:**

- Leading Commerce's economic development team, in concert with sister agencies, to assist regional and local economic development organizations (EDO's) help 75+ businesses create 3500+ new direct jobs and leverage \$5-\$6 million in federal and state grants to bring \$800+ million in private capital investment to the state over an 18 month period.
- Launching a business retention and expansion program with Lt. Governor Brad Little to incorporate company visits in his travels across the state. The program was coordinated with local EDO's and included visits to businesses that are major contributors to the region/state, at-risk or recently acquired, as well as small business start-ups.

### **Executive Director, Bannock Development Corporation (BDC)**

### **Executive Director/Board Member, Pocatello Development Authority (PDA)**

Pocatello, Idaho; June 2006 - December 2011

#### **Key accomplishments include:**

- Leading the regional economic development team to help several businesses create 2000+ new direct jobs, retain 1000+ positions, and bring over \$600M in capital to the region.
- Working with the Pocatello and Chubbuck Urban Renewal Agencies, and the respective city staff, to establish four new tax increment financing districts to improve infrastructure and encourage economic development; as well as close completed districts where the combined improvements increased valuation in the TIF area by over \$250M.

**Executive Director, Custer (CEDA) & Lemhi County Economic Development (LCEDC)**

Challis & Salmon, Idaho; December 2002 - May 2006

**Key accomplishments include:**

- Teaming-up ED efforts in Salmon and Challis to complete the EDA-funded 15,000sf Salmon Business Center, initiating start-up and making it profitable in its first year of operations with the establishment of the ISU/EITC distance learning center, recruitment of a 40-man service center as the anchor tenant, and classroom space for community office skills workshops. In its first year of operations, nearly 50 students completed college courses or a CNA degree in rural Idaho.
- Bringing over \$1 million in program funding, including one of four highly-coveted NW Area Foundation Great Strides Award and a Steele Reese Foundation Grant. The latter was for the Challis Rapid Reaction Observatory, a program developed in partnership with NASA's Goddard Station and BSU's Astrophysics Department to encourage student participation in STEM programs.

**Professional & Volunteer Affiliations**

**Regional, State & National Level Participation, highlights, 2006-present**

- International Economic Development Council (IEDC), Board 2014-2016, Membership 2006-present
- National Council of State Governments, Chairman's Commission on Economic Devp, 2012-present
- Idaho Economic Development Association (IEDA), Various Board & Chair Positions, 2002-present
- Idaho NSF EPSCoR (National Science Foundation Experimental Program to Stimulate Competitive Research) State Committee, 2009-Present
- Albertson Foundation Working Group for Rural Education & Workforce Development; and, Idaho Power Planning Advisory Council, 2012-2013
- Eastern Idaho Development Corporation, Pocatello Industrial Lands Board, Greater Pocatello Chamber of Commerce, Board of Directors, 2006-2012

**Local Level Involvement, highlights, 2000-present**

- Various classes/programs at Idaho State University, Boise State University, SBDC, Working Women's Symposium, and many others: Guest Lecturer, panel/guest speaker
- SE Idaho United Way, Idaho Food Bank, Greater Pocatello Chamber, Idaho State University Veteran's Sanctuary Center, Challis and Pocatello Arts Council, and Challis Volunteer Fire Department: Fundraising Drive Chair, Board Director, Chairman, volunteer

**Key Honors and Awards**

- Idaho Business Review 2014 Women of the Year Honoree, Boise, Idaho, February 2014
- Special Invitation, White House Economic Development Forum, US Commerce-SelectUSA and International Economic Development Council, Washington, DC, August 2013
- City of Pocatello Economic Development Appreciation Award, Pocatello, Idaho, August 2010
- Idaho State Journal Businessperson of the Year, Pocatello, Idaho, February 2008
- Key to the City for Outstanding Economic Development Service, Salmon, Idaho, May 2006
- Special Community Service Award, Salmon Challis National Forest, Challis, Idaho, January 2004

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**CONSENT**  
**OCTOBER 22, 2015**

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**SUBJECT**

Indian Education Committee Appointments

**REFERENCE**

February 21, 2013	The Board approved the first reading of Board Policy I.P. combining the Higher Education and K-12 Indian Education Committees
April 18, 2013	The Board approved the second reading of Board Policy I.P. combining the Higher Education and K-12 Indian Education Committees
December 19, 2013	The Board approved members of the Idaho Indian Education Committee.
June 18, 2014	The Board approved the appointment of Dani Hansing to the Committee.
August 14, 2014	The Board approved the appointment of Kathy Albin and Bill Picard.
October 16, 2014	The Board approved the appointment of Mitzi Sabori to the Committee.
February 19, 2015	The Board approved the appointment of Pete Putra and Will Fanning.
June 18, 2015	The Board approved the appointment of Nolan Goubeaux.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section I.P.

**BACKGROUND/DISCUSSION**

The purpose of the Board's Indian Education Committee is "to advocate for American Indian students, act as an advisory body to the State Board of Education and the State Superintendent of Public Instruction, and serve as a link between the American Indian Tribes".

The Idaho Indian Education Committee consists of 19 members appointed by the Board and includes the following consistent with Board Policy I.P.

- One representative from each of the eight public postsecondary institutions
- One representative from each of the five tribal chairs or designee
- One representative from each of the five tribal education affiliations (K-12)
- One representative from each of the two Bureau of Indian Education schools
- One representative from the State Board of Education, as an ex-officio member

The Coeur d'Alene Tribe has forwarded Mr. Donovan Chase's name for consideration to fill the current vacant seat for the Bureau of Indian Education

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school representative. Mr. Chase currently serves as the school's superintendent/principal. The tribe has also forwarded Ms. Shawna Daniels' name to fill the vacant seat for the Coeur d'Alene Tribe's K-12 representative on the committee.

**IMPACT**

The proposed appointments replace the representatives on the Committee.

**ATTACHMENTS**

Attachment 1 – Current Committee Membership	Page 3
Attachment 2 – Nomination Letter	Page 5

**STAFF COMMENTS AND RECOMMENDATIONS**

Mr. Eric Kendra currently represents the Coeur d'Alene Tribal School and has left employment at the school. Mr. Donovan Chase has been identified to replace Mr. Kendra and serve as the Bureau of Indian Education representative. If approved, Mr. Chase would complete the current term of Mr. Kendra which runs from July 1, 2013 – June 30, 2016 and a new five-year term of July 1, 2016 – June 30, 2021.

Ms. Kathy Albin currently represents the Coeur d'Alene Tribe and has left employment with the Tribal Education Department. Ms. Shawna Daniels has been identified to replace Ms. Albin and serve as the K-12 representative. If approved, Ms. Daniels would complete the term of Ms. Albin which runs from July 1, 2013 – June 30, 2016 and a new five-year term of July 1, 2016 – June 30, 2021.

Given that both individuals would be completing terms vacated by previous committee members that expire in less than a year, Board staff recommends including the approval of an additional five-year term consistent with Board Policy I.P.2.

**BOARD ACTION**

I move to appoint Mr. Donovan Chase, representing the Coeur d'Alene Tribal School and Ms. Shawna Daniels to serve as the K-12 representative for the Coeur d'Alene Tribe to the Idaho Indian Education Committee effective immediately and expiring June 30, 2021.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

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**State Board of Education**  
**Indian Education Committee**

**Dr. Yolanda Bisbee** is the Executive Director of Tribal Relations at the University of Idaho (UI). Term: July 1, 2013 – June 30, 2017.

**Selena Grace** is the Associate Vice President for Institutional Effectiveness at Idaho State University (ISU). Term: July 1, 2013 – June 30, 2016.

**James Anderson** is the Vice President for Enrollment Services in the Division of Student Affairs at Boise State University (BSU). Term: July 1, 2013 – June 30, 2018

**Bob Sobotta, Jr.** is the Director of Native American/Minority Student Services at Lewis-Clark State College (LCSC). Term: July 1, 2013 – June 30, 2016

**Evanlene Melting-Tallow** is an Advisor for American Indian students at North Idaho College (NIC). Term: July 1, 2013 – June 30, 2017

**Nolan Goubeaux** is the Associate Dean of Student Affairs for the College of Southern Idaho (CSI). Term: July 1, 2013 – June 30, 2018

**Will Fanning** is the Dean of Professional-Technical Education at the College of Western Idaho (CWI). Term: July 1, 2013 – June 30, 2016

**Jared Gardner** is currently an Admissions Counselor at Eastern Idaho Technical College (EITC). Term: July 1, 2013 – June 30, 2017

**Jennifer Porter** is the chairperson's designee for the Kootenai Tribe. Term: July 1, 2013 – June 30, 2017

**Dr. Chris Meyer** is the Director of Education for the Coeur d'Alene tribe and serves as the Tribal Chairperson's designee for the Coeur d'Alene Tribe. Term: July 1, 2013 – June 30, 2016

**VACANT** is the High School Coordinator for the Coeur d'Alene tribe and serves as the K-12 Representative for the Tribe. Term: July 1, 2013 – June 30, 2016

**Bill Picard** is a member of the Nez Perce Tribal Executive committee and serves as the Tribal Chairperson's designee. Term: July 1, 2013 – June 30, 2018

**Joyce McFarland** is the Education Manager for the Nez Perce tribe and serves as the K-12 representative for the Nez Perce tribe. Term: July 1, 2013 – June 30, 2018

**Mitzi Sabori** is a member of the Fort Hall Business Council and serves as the Tribal Chairperson's designee for the Shoshone-Bannock Tribes. Term: July 1, 2013 – June 30, 2017

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**VACANT** is the Youth Education Coordinator for the Shoshone-Bannock Tribes and serves as the K-12 representative for the Shoshone-Bannock Tribes. Term: July 1, 2013 – June 30, 2016

**Pete Putra** is a member of the Shoshone-Paiute Tribes and serves as the Tribal Chairperson's designee for the Shoshone-Paiute Tribes. Term: July 1, 2013 – June 30, 2018

**Shana Thomas** is the Owhyee Combined School Counselor for the Shoshone-Paiute Tribes and serves as the K-12 representative for the Shoshone-Paiute Tribes. Term: July 1, 2013 – June 30, 2017

**VACANT** is the Superintendent of the Coeur d'Alene Tribal School and serves as the one of the Bureau of Indian Education school representatives. Term: July 1, 2013 – June 30, 2016

**Eric Lords** is the Superintendent of the Sho-Ban Jr-Sr High School and serves as the one of the Bureau of Indian Education school representatives. Term: July 1, 2013 – June 30, 2018



**COEUR D'ALENE TRIBE**  
OFFICE OF THE CHAIRMAN  
P.O. BOX 408  
PLUMMER, IDAHO 83851  
(208) 686-1800 • Fax (208) 686-8813

August 4, 2015

Patty Sanchez  
Academic Affairs Program Manager Readiness  
Office of the State Board Education  
PO Box 83720  
Boise, ID 83720-0037

Dear Ms. Sanchez,

The purpose of this letter is to nominate representatives from the Coeur d'Alene Tribe to the Indian Education Committee.

We would like to nominate Donovan Chase from the Coeur d'Alene Tribal School to serve as our designated representative on the Indian Education Committee. Additionally, we would like to nominate Shawna Daniels to serve as the Coeur d'Alene Tribe's K-12 representative on the committee.

Thank you for your consideration. We look forward to hearing of the progress of the committee.

Sincerely,

A handwritten signature in blue ink, appearing to read "Chase", is written over the name of the signatory.

Chief J. Allan  
Chairman, Coeur d'Alene Tribe

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**CONSENT**  
**OCTOBER 22, 2015**

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**IDAHO DIVISION OF VOCATIONAL REHABILITATION**

**SUBJECT**

Idaho State Rehabilitation Council Membership

**APPLICABLE STATUTE, RULE, OR POLICY**

Federal Regulations 34 CFR§361.

**BACKGROUND/DISCUSSION**

Federal Regulations (34 CFR §361.17), set out the requirements for the State Rehabilitation Council, including the appointment and composition of the Council.

The members of the Council must be appointed by the Governor or, in the case of a State that, under State law, vests authority for the administration to an entity other than the Governor, the chief officer of that entity. Section 33-2303, Idaho code designates the State Board for Professional-Technical Education as that entity.

Further federal regulations establish that the Council must be composed of at least fifteen (15) members, including:

- i. At least one representative of the Statewide Independent Living Council, who must be the chairperson or other designee of the Statewide Independent Living Council;
- ii. At least one representative of a parent training and information center established pursuant to section 682(a) of the Individuals with Disabilities Education Act;
- iii. At least one representative of the Client Assistance Program established under 34 CFR part 370, who must be the director of or other individual recommended by the Client Assistance Program;
- iv. At least one qualified vocational rehabilitation counselor with knowledge of and experience with vocational rehabilitation programs who serves as an ex officio, nonvoting member of the Council if employed by the designated State agency;
- v. At least one representative of community rehabilitation program service providers;
- vi. Four representatives of business, industry, and labor;
- vii. Representatives of disability groups that include a cross section of (A) Individuals with physical, cognitive, sensory, and mental disabilities; and (B) Representatives of individuals with disabilities who have difficulty representing themselves or are unable due to their disabilities to represent themselves;
- viii. Current or former applicants for, or recipients of, vocational rehabilitation services;

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- ix. In a State in which one or more projects are carried out under section 121 of the Act (American Indian Vocational Rehabilitation Services), at least one representative of the directors of the projects;
- x. At least one representative of the State educational agency responsible for the public education of students with disabilities who are eligible to receive services under this part and part B of the Individuals with Disabilities Education Act;
- xi. At least one representative of the State workforce investment board; and
- xii. The director of the designated State unit as an ex officio, nonvoting member of the Council.

Additionally, Federal Regulation specify that a majority of the council members must be individuals with disabilities who meet the requirements of 34 CFR §361.5(b)(29) and are not employed by the designated State unit. Members are appointed for a term of no more than three (3) years, and each member of the Council, may serve for not more than two consecutive full terms. A member appointed to fill a vacancy occurring prior to the end of the term must be appointed for the remainder of the predecessor's term. A vacancy in membership of the Council must be filled in the same manner as the original appointment, except the appointing authority may delegate the authority to fill that vacancy to the remaining members of the Council after making the original appointment.

The Council currently has one (1) reappointment and one (1) new appointment for Board approval. Gordon Graff is requesting to be reappointed as a representative of the Workforce Development Council; his first term expired August 31, 2015. Mel Leviton is requesting to be appointed as a representative of the State Independent Living Council.

**IMPACT**

The above two (2) appointments will bring the IDVR Advisory Council membership to a total of 17 with one vacancy on the council for a representative of business, industry and labor. Minimum composition for the council is 15 members.

**ATTACHMENTS**

Attachment 1 - Current Council Membership

Page 3

**BOARD ACTION**

I move to approve the reappointment of Gordon Graff to the Vocational Rehabilitation State Rehabilitation Council as a representative of the Workforce Development Council for a term of three years effective September 1, 2015 and ending August 31, 2018.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

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I move to approve the appointment of Mel Leviton to the Vocational Rehabilitation State Rehabilitation Council as a representative of The State Independent Living Council for a term of three years effective October 1, 2015 and ending September 30, 2018.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

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<b>Members Shall Represent:</b>	<b>Number of Representatives Required</b>	<b>Name</b>	<b>Term Ends</b>	<b>Serving Term # (maximum 2)</b>
<b>Parent Training &amp; Information Center...</b>	Minimum 1	Angela Lindig	6/30/2018	1
<b>Department of Education</b>	Minimum 1	Alison Lowenthal	6/30/2017	1
<b>Client Assistant Program</b>	Minimum 1	Dina Flores - Brewer	n/a	No Limit
<b>Workforce Development Council</b>	Minimum 1	Gordon Graff	8/31/2018	1
<b>Director of Vocational Rehabilitation</b>	Minimum 1	Jane Donnellan	n/a	No Limit
<b>Former Applicant or Recipient</b>	Minimum 1	Lonnie Pitt	6/30/2018	1
<b>Community Rehabilitation Program</b>	Minimum 1	Lori Gentillon	6/30/2018	1
<b>Business, Industry and Labor</b>	Minimum 4	Lucas Rose	6/30/2017	1
		Rachel Damewood	6/30/2017	2
		Judith James	4/30/2018	1
		VACANT		
<b>VR Counselor</b>	Minimum 1	Suzette Whiting	6/30/2018	1
<b>Idaho's Native American Tribes</b>	Minimum 1	Ramona Medicine Horse	6/30/2014	No Limit
		David Miles	6/30/2014	No Limit
<b>State Independent Living Council</b>	Minimum 1	Mel Leviton	9/30/2018	
<b>Disability Advocacy groups</b>	No minimum or maximum	Jayne Womack	6/30/2018	1
		Molly Sherpa	3/31/2017	1
		Mike Hauser	2/28/2018	1
updated 1/14/15				Total Mbrs 17

**CONSENT**  
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**SUBJECT**

Appointment to the Data Management Council

**REFERENCE**

February 2015 Board approved three (3) appointments to the Data Management Council, Matthew Rauch, Will Goodman, and Shari Ellertson.

June 2015 Board approved the reappointment of Georgeanne Griffith, Tami Haft, Carson Howell, Todd King, Heather Luchte, and Vince Miller and the appointment of Chris Campbell replacing Will Goodman.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section I.O.

**BACKGROUND/DISCUSSION**

The Data Management Council (Council) is tasked with making recommendations on the oversight and development of Idaho's Statewide Longitudinal Data System (SLDS) and oversees the creation, maintenance and usage of said system. There are 12 seats on the Council. The Council membership is made up of one (1) representative from the Office of the State Board of Education, three (3) representatives from public postsecondary institutions, of whom at least one shall be from a community college and no more than one member from any one institution; one representative who serves as the registrar at an Idaho public postsecondary institution; two (2) from the State Department of Education; three (3) representatives from a school district, with at least one from an urban district and one from a rural district, and no more than one member from any one district; one (1) representative from the Division of Professional-Technical Education; and one (1) representative from the Department of Labor.

Board member Linda Clark was serving on the Data Management Council as a school district representative from an urban district. With her appointment to the State Board of Education, she has resigned her seat on the Council. Dr. Clark recommended Don Coberly to serve on the Council. Dr. Don Coberly has worked for the Boise School District since 1984. He has been a teacher at the elementary level in several districts, was Language Arts Supervisor for the Boise District from 1984-1994, and became the District's Curriculum Coordinator in 1994. He has Bachelor's Degrees in History and Elementary Education from the University of Idaho, a Master's Degree in Reading from Boise State University, and a Ph. D. from the University of Idaho in Education.

**IMPACT**

Appointment of Dr. Coberly will fill the open seat on the Data Management Council.

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**STAFF COMMENTS AND RECOMMENDATIONS**

The Data Management Council met September 9, 2015 and formally voted to recommend Dr. Don Coberly for the open seats on the Council. Dr. Coberly expressed his desire to serve on the Council and is qualified.

Staff recommends approval.

**ATTACHMENTS**

Attachment 1 – Data Management Council Current Membership

Page 3

**BOARD ACTION**

I move to approve the appointment of Dr. Don Coberly to the Data Management Council, representing urban school districts, effective immediately and expiring June 30, 2016.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

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**DATA MANAGEMENT COUNCIL MEMBERSHIP**

Carson Howell – Office of the State Board of Education  
Tami Haft – Registrar  
Georgia Smith – Idaho Department of Labor  
Vince Miller – Idaho State University  
Heather Luchte – Professional and Technical Education  
Ken Campbell – College of Southern Idaho  
Georgeanne Griffith – Lakeland School District  
Shari Ellertson – Boise State University  
Todd King – Idaho Department of Education  
Matthew Rauch – Kuna School District  
Chris Campbell – Idaho Department of Education

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**CONSENT**  
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**SUBJECT**

President Approved Alcohol Permits Report

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies and Procedures, I.J.2.b.

**BACKGROUND/DISCUSSION**

The chief executive officer of each institution may waive the prohibition against possession or consumption of alcoholic beverages only as permitted by, and in compliance with, Board policy. Immediately upon issuance of an Alcohol Beverage Permit, a complete copy of the application and the permit shall be delivered to the Office of the State Board of Education, and Board staff shall disclose the issuance of the permit to the Board no later than the next Board meeting.

The last update presented to the Board was at the August 2015 Board meeting. Since that meeting, Board staff has received twenty seven (27) permits from Boise State University, twenty two (22) permits from Idaho State University, eighteen (18) permits from the University of Idaho, and one (1) permits from Lewis-Clark State College.

Board staff has prepared a brief listing of the permits issued for use. The list is attached for the Board's review.

**ATTACHMENTS**

Attachment 1 - List of Approved Permits by Institution

Page 3

**BOARD ACTION**

This item is for informational purposes only. Any action will be at the Board's discretion.

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<b>APPROVED ALCOHOL SERVICE AT BOISE STATE UNIVERSITY August 2015 - October 2015</b>				
<b>EVENT</b>	<b>LOCATION</b>	<b>Institution Sponsor</b>	<b>Outside Sponsor</b>	<b>DATE (S)</b>
Uyen Dinh and Damata Peko Wedding	Stueckle Sky Center		X	08/22/15
Bronco Athletic Association	Albertson's Stadium – Field		X	08/24/15
Flight Basketball Fundraiser	Student Union Building		X	08/29/15
CMoore Live	Stueckle Sky Center		X	09/01/15
Ariana Grande Concert	Taco Bell Arena		X	09/02/15
COBE Brunch	College of Business and Economics	X		09/03/15
Women's Leadership Conference	Student Union Building		X	09/09/15- 09/10/15
Idaho After School Annual Summit	Student Union Building		X	09/14/15
Sound of Music	Morrison Center		X	09/14/15
Idaho State Nonprofit Conference Reception	Student Union Building		X	09/15/15
Shania Twain Concert	Taco Bell Arena		X	09/15/15
Ed Leadership Reception	Stueckle Sky Center		X	09/16/15
Albertson's Meeting	Stueckle Sky Center		X	09/17/15
Dave Chappelle Comedy Show	Morrison Center		X	09/19/15
Ronald McDonald Auction Banquet	Stueckle Sky Center		X	09/22/15
Red Sky PR Training & Reception	College of Business and Economics		X	09/23/15
Don Williams Country Concert	Morrison Center		X	09/23/15
Friends of Nursing Saint Alphonsus Appreciation	Stueckle Sky Center		X	09/24/15
Opening Night Philharmonic Concert	Morrison Center		X	09/26/15
Power Engineers	College of Business and Economics		X	09/28/15
Idaho Library Association Conference	Student Union Building		X	10/01/15
John Mulaney Comedy Show	Morrison Center		X	10/02/15
Arts & Humanities Art Exhibit & Reception	Yanke HI Gallery	X		10/02/15

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<b>EVENT</b>	<b>LOCATION</b>	<b>Institution Sponsor</b>	<b>Outside Sponsor</b>	<b>DATE (S)</b>
National Conference of Association of Higher Education Real Estate Officials Reception	Stueckle Sky Center		X	10/04/15
Doerr with Walker Lecture	Morrison Center		X	10/06/15
The Cabin	Morrison Center		X	10/06/15
Idaho IT Symposium	Student Union Building		X	10/06/15

**CONSENT  
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<b>APPROVED ALCOHOL SERVICE AT IDAHO STATE UNIVERSITY August 2015 – April 2016</b>				
<b>EVENT</b>	<b>LOCATION</b>	<b>Institution Sponsor</b>	<b>Outside Sponsor</b>	<b>DATE (S)</b>
Build a Better Connection: Digital Marketing University	Student Union Building		X	08/19/15
Gone Fishin' Grand Opening Party	Idaho Museum of Natural History		X	08/21/15
Welcome Assembly for Faculty and Staff	Stephens Performing Arts Center	X		09/10/15
College of Pharmacy Class Reunion	Quadrangle – Leonard Hall		X	09/11/15
Ken Smith Legacy Reception	Stephens Performing Arts Center		X	09/11/15
Idaho State Civic Symphony Concert	Stephens Performing Arts Center		X	09/26/16
State of the University Address	Stephens Performing Arts Center	X		09/30/15
Anthropology Department Fall Reception	Idaho Museum of Natural History		X	10/09/15
Meet & Greet with Dignitaries	Stephens Performing Arts Center		X	10/14/15
Board of Directors Fall Dinner	Student Union Building – Wood River/Little Wood Room		X	10/15/15
President's Homecoming Lunch	Student Union Building – Ballroom	X		10/17/15
JFAC Tour and Dinner	Center for Advanced Engineering Studies	X		10/21/15
Opera Idaho Pre-performance Dinner	Stephens Performing Arts Center		X	11/06/15
ISU Faculty Showcase Scholarly & Creative Works 2015	Student Union Building – Wood River/Little Wood Room	X		11/12/15
Idaho State Civic Symphony Concert	Stephens Performing Arts Center		X	11/13/15
Idaho State Civic Symphony Concert	Stephens Performing Arts Center		X	12/11/15
Idaho State Civic Symphony Concert	Stephens Performing Arts Center		X	12/12/15
Hospice of Eastern Idaho Wine Tasting	Student Union Building		X	01/30/16
Idaho State Civic Symphony Concert	Stephens Performing Arts Center		X	02/12/16
Idaho State Civic Symphony Concert	Stephens Performing Arts Center		X	03/11/16
Idaho State Civic Symphony Concert	Stephens Performing Arts Center		X	04/29/16

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EVENT	LOCATION	Institution Sponsor	Outside Sponsor	DATE (S)
Idaho State Civic Symphony Concert	Stephens Performing Arts Center		X	04/30/16

**CONSENT  
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<b>APPROVED ALCOHOL SERVICE AT UNIVERSITY OF IDAHO August 2015 – November 2015</b>				
<b>EVENT</b>	<b>LOCATION</b>	<b>Institution Sponsor</b>	<b>Outside Sponsor</b>	<b>DATE (S)</b>
Mayor's Golf Tournament	Golf Course	X		08/14/15
CBE Faculty Retreat	JA Albertson Building – First Floor	X		08/20/15
New Administrator's Social	Brink Building – Faculty Lounge	X		08/27/15
UI-SEL Event	Bruce Pitman Center	X		09/01/15
Vandal Football Pregame and Game	Litehouse Center – Bud & June Ford Room	X		09/03/15 – 11/28/15
Course Improvement Tournament	Golf Course	X		09/13/15
Faculty Senate Leadership Reception	Bruce Pitman Center	X		09/16/15
Constitution Day 2015 CLE Reception	UI – Boise		X	09/17/15
Faculty Gathering – Interdisciplinary Research Reception	Brink Building – Faculty Lounge	X		09/18/15
Naval ROTC Golf Tournament	Golf Course	X		09/18/15
Naval ROTC 70 <sup>th</sup> Anniversary Celebration	International Ballroom	X		09/18/15
Alpha Phi's Red Dress Poker Tournament	Bruce Pitman Center	X		09/25/15
Carolyn Finney Faculty Dinner	Moscow Reveley Facility		X	09/25/15
Crosstoberfest	UI Extension – Sandpoint		X	10/04/15
KUID 50 <sup>th</sup> Anniversary Reception	Albertson Atrium	X		10/09/15
Bellwood Lecture Reception	Idaho Law and Justice Learning Center		X	10/12/15
College of Engineering Leadership Tour	UI – Boise		X	10/20/15
Golden I Reunion Celebration Dinner	Bruce Pitman Center	X		10/22/15

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**APPROVED ALCOHOL SERVICE AT  
LEWIS-CLARK STATE COLLEGE  
June 2015 – December 2015**

<b>EVENT</b>	<b>LOCATION</b>	<b>Institution Sponsor</b>	<b>Outside Sponsor</b>	<b>DATE (S)</b>
Winter Revels Holiday Party – Employee Gathering	William's Conference Center	X		12/11/15

**CONSENT**  
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**SUBJECT**

Appointments to the Curricular Materials Selection Committee

**APPLICABLE STATUTE, RULE, OR POLICY**

Section 33-118; 33-118a, Idaho Code

**BACKGROUND/DISCUSSION**

Sections 33-118 and 33-118a, Idaho Code and IDAPA 08.02.03.128 – Rules Governing Thoroughness, sets forth criteria for membership on the Curricular Materials Selection Committee.

Pursuant to Section 33-118a, Idaho Code the State Board of Education shall appoint a committee to select curriculum materials. Committee appointments will be for a period of five (5) years. Committee appointments shall consist of not less than ten (10) total members from the following stakeholder groups: certified Idaho classroom teachers, Idaho public school administrators, Idaho higher education officials, parents, trustees, local board of education members, members of the Division of Professional Technical Education, and State Department of Education personnel. The Executive Secretary will be an employee of the State Department of Education and will be a voting member of the committee.

Nominations were sought for the positions from Idaho School Districts, the Idaho State Department of Education, and the Division of Professional Technical Education. All resumes received for interested individuals are attached. One current member has submitted a letter of resignation.

**RESUMES**

Sarah J. Anderson, Boise State University; Melyssa Ferro; Caldwell School District, Catherine Griffin, Heritage Community Charter School; Tauna Johnson, Genesee School District 282; Zoe Ann Jorgensen, Idaho Falls School District 91; Lori Conlon Khan, Boise State University; Sharon Tennent, Boise Independent School District 1; Darlene Matson Dyer, Patron; D. Laree Jansen, Patron; Stacey Jensen, Pocatello/Chubbuck School District 25

**RESIGNATION**

Tara Drexler, Twin Falls School District 411

The State Department of Education Rules committee recommends approval.

**ATTACHMENTS**

Attachment 1 – Committee Membership	Page 5
Attachment 2 – Resumes	Page 9
Attachment 3 – Resignation Letter from Tara Drexler	Page 37

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**BOARD ACTION**

I move to appoint Sarah J. Anderson to the Curricular Materials Selection Committee for a five-year term effective November 1, 2015, and ending October 31, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_\_ No \_\_\_\_

I move to appoint Melyssa Ferro to the Curricular Materials Selection Committee for a five-year term effective November 1, 2015, and ending October 31, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_\_ No \_\_\_\_

I move to appoint Catherine Griffin to the Curricular Materials Selection Committee for a five-year term effective November 1, 2015, and ending October 31, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_\_ No \_\_\_\_

I move to appoint Tauna Johnson to the Curricular Materials Selection Committee for a five-year term effective November 1, 2015, and ending October 31, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_\_ No \_\_\_\_

I move to appoint Zoe Ann Jorgensen to the Curricular Materials Selection Committee for a five-year term effective November 1, 2015, and ending October 31, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_\_ No \_\_\_\_

I move to appoint Lori Conlon Khan to the Curricular Materials Selection Committee for a five-year term effective November 1, 2015, and ending October 31, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_\_ No \_\_\_\_

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I move to appoint Sharon Tennent to the Curricular Materials Selection Committee for a five-year term effective November 1, 2015, and ending October 31, 2020.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_ No \_\_\_

I move to reappoint Darlene Matson Dyer to the Curricular Materials Selection Committee for a five-year term effective July 1, 2016, and ending June 30, 2021.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_ No \_\_\_

I move to reappoint D. Laree Jansen to the Curricular Materials Selection Committee for a five-year term effective July 1, 2016, and ending June 30, 2021.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_ No \_\_\_

I move to reappoint Stacey Jensen to the Curricular Materials Selection Committee for a five-year term effective July 1, 2016, and ending June 30, 2021.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_ No \_\_\_

I move to accept the resignation of Tara Drexler from the Curricular Materials Selection Committee.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried: Yes \_\_\_ No \_\_\_

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**IDAHO  
Curricular Materials Selection Committee  
Appointed by the State Board of Education  
2015**

COMMITTEE MEMBER	CONTACT INFORMATION
Executive Secretary, Idaho State Department of Education <b>Kathy Gauby</b> Coordinator, Curricular Materials and Online Course Review Idaho State Department of Education PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6967 E-mail: kgauby@sde.idaho.gov
Curriculum Consultant, Idaho State Department of Education (Ex-officio) <b>Diann Roberts</b> Coordinator, English Language Arts/Literacy Idaho State Department of Education PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6948 E-mail: droberts@sde.idaho.gov
Curriculum Consultant, Division of Professional Technical Education <b>Kristi Enger</b> State Division of Professional Technical Education PO Box 83720 Boise, ID 83720-0095	Phone: 208-334-3216 E-mail: kenger@pte.idaho.gov 5-Year Term Expires: May 31, 2019
Curriculum Consultant, Idaho State Department of Education (Ex-officio) <b>Christine Avila</b> Coordinator, Mathematics Idaho State Department of Education PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6932 E-mail: cavila@sde.idaho.gov
Curriculum Consultant, Idaho State Department of Education (Ex-officio) <b>Rick Kennedy</b> Coordinator, Instructional Technology PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6852 E-mail: rkennedy@sde.idaho.gov
Curriculum Consultant, Idaho State Department of Education (Ex-officio) <b>Audra Urie</b> Coordinator, Driver Education PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6984 E-mail: aurie@sde.idaho.gov
Idaho Public School Administrator <b>Dana Bradley</b> Cassia County School District 237 E. 19 <sup>th</sup> St. Burley, ID 83318	Phone: 208-878-6627 E-mail: bradana@sd151.k12.id.us 5-Year Term Expires: June 30, 2016
Representative <b>Laree Jansen</b> 3669 North 3200 East	Phone: 208-733-1168 E-mail: lareej@cablone.net

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Kimberly, ID 83341-5344	5-Year Term Expires: June 30, 2016
Idaho Public School Elementary Classroom Teacher <b>Stacey Jensen</b> Edahow Elementary School 2020 Pocatello Creek Road Pocatello, ID 83201	Phone: 208-233-1844 E-mail: jensenst@d25.k12.id.us 5-Year Term Expires: June 30, 2016
Idaho Public School Secondary Classroom Teacher <b>Tara Drexler</b> Robert Stuart Middle School 644 Caswell Avenue West Twin Falls, ID 83301-3798	Phone: 208-733-4875 E-mail: drexlerta@ffsd.k12.id.us 5-Year Term Expires: June 30, 2016
Representative <b>Darlene Matson Dyer</b> PO Box 1981 Hailey, ID 83333	Phone: 208-788-4318 E-mail: ddyer331@gmail.com 5-Year Term Expires: June 30, 2016
Idaho Public School Secondary Classroom Teacher <b>Lisa Olsen</b> Rocky Mountain Middle School 3443 N. Ammon Rd. Idaho Falls, ID 83401	Phone: 208-525-4403 E-mail: olsenl@d93.k12.id.us 5-Year Term Expires: May 31, 2019
Idaho Public School Elementary Classroom Teacher <b>Heidi Fry</b> Siena K8 Magnet School 2870 E. Rome Dr. Meridian, ID 83642	Phone: 208-350-4370 E-mail: fry.heide@meridianschools.org 5-Year Term Expires: May 31, 2019
Idaho Public School Elementary Classroom Teacher <b>Donna Wommack</b> Genesee Joint School District #282 330 W. Ash Ave. Genesee, ID 83832	Phone: 208-285-1161 E-mail: dwommack@sd282.org 5-Year Term Expires: May 31, 2019
Idaho Public School Secondary Classroom Teacher <b>Rebecca Parrill</b> Lewiston Independent School District No. 1 3317 12 <sup>th</sup> Street Lewiston, ID 83501	Phone: 208-748-3000 E-mail: rparrill@lewistonschools.net 5-Year Term Expires: May 31, 2019
Idaho Public School Secondary Classroom Teacher <b>Kristie Scott</b> West Jefferson High School 1260 E. 1500 N Terreton, ID 83450	Phone: 208-663-4391 E-mail: scottk@wjsd.org 5-Year Term Expires: May 31, 2019
Idaho Public School Secondary Classroom Teacher <b>Chris Wadley</b> Whitepine Joint School District Deary Jr/Sr High School 502 First Ave. , PO Box 9 Deary, ID 83823	Phone: 208-877-1151 E-mail: cwadley@sd288.k12.id.us 5-Year Term Expires: May 31, 2019

**CONSENT  
OCTOBER 22, 2015**

REGIONAL CENTERS	CONTACT INFORMATION
College of Idaho <b>Claudia Nelson</b> N.L. Terteling Library 2112 Cleveland Blvd Caldwell, ID 83605	Phone: 208-459-5521 E-mail: <a href="mailto:cnelson@collegeofidaho.edu">cnelson@collegeofidaho.edu</a>
Boise State University <b>Margie Ruppel</b> Reference Librarian, Liaison to College of Ed Albertson Library 1910 University Blvd	Phone: 208-426-1323 E-mail: <a href="mailto:margieruppel@boisestate.edu">margieruppel@boisestate.edu</a>
Brigham Young University–Idaho <b>Holly Green</b> David O McKay Library, MCK 306 525 South Center Street (0405) Rexburg, ID 83460-0405	Phone: 208-496-9514 E-mail: <a href="mailto:greenh@byui.edu">greenh@byui.edu</a>
Idaho State University <b>Dr. Shu-Yuan Lin</b> Instructional Materials Center College of Education 638 E. Dunn Street Pocatello, ID 83209-8059	Phone: 208-282-3185 E-mail: <a href="mailto:linshu@isu.edu">linshu@isu.edu</a>
Lewis Clark State College <b>Shannon Casteel</b> Curriculum Library 500 8th Avenue Lewiston, ID 83501	Phone: 208-792-2229 E-mail: <a href="mailto:scasteel@lcsc.edu">scasteel@lcsc.edu</a>
Northwest Nazarene University <b>Carol Poe</b> John Riley Library 623 University Boulevard Nampa, ID 83686-5897	Phone: 208-467-8616 E-mail: <a href="mailto:cipoe@nnu.edu">cipoe@nnu.edu</a> (Call before delivery.)
University of Idaho <b>Ramirose Attebury</b> University of Idaho Library 875 Perimeter Dr. Moscow, ID 83844-3089	E-mail: <a href="mailto:rattebur@uidaho.edu">rattebur@uidaho.edu</a> Phone: 208-885-7257
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Rev. 5/2015

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## Sarah J. Anderson

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sarah.joy.anderson@gmail.com

### Experience

#### Lecturer

Boise State University

College of Education

Curriculum, Instruction, and Foundational Studies Department

*ED CIFS 333 Elementary Science Curriculum and Instruction – 2 Sections/Semester Fall 2014 & Spring 2015*

*ED CIFS 329 Assessment in Teaching and Learning – 1 Section/Semester Fall 2014 & Spring 2015*

*Supervise one Independent Study Student Spring 2015*

*University Liaison – Mountain View High School Fall 2014 – Spring 2015*

*Coordinate with MVHS Administration and Mentor Teachers*

*Supervise Interns and Students Teachers*

#### Secondary Science Teacher

Frenship High School

902 Dowden Rd., Wolfforth, TX 79382

Forensics 2012-2013

Biology 2000-2003, 2010-2012

Science Department Chair 2003-2008

Pre AP Biology 2003-2008

Integrated Physics and Chemistry (IPC) 2000-01, 03-04, 05-06

Texas Assessment of Knowledge and Skills (TAKS) Acceleration/Remediation 2003-2005

Advanced Placement (AP) Biology 2001-2003

Anatomy and Physiology 2001-2003

#### Center for the Integration of STEM Education & Research (CISER) 2008 – 2010

Texas Tech University

3008 18<sup>th</sup> Street, Lubbock, TX 79409-1071

Coordinator for STAC – Science Teacher Academy at CISER

*Supervise Undergraduate Science Education Scholars*

*Plan, organize, and present elementary and secondary professional development for Region 17 science teachers*

*Instructor, BIOL 4301- Give Teaching A Chance*

*Participate in the implementation and distribution of grant funds*

Howard Hughes Medical Institute Science Education Program at TTU

Exemplar – Greater Texas Foundation

*Collaborate with TTU departments, centers, faculty, and staff to provide quality science education opportunities for students and teachers*

TTU T-STEM Center

Texas Tech University College of Education

IDEAL – The Institute for the Development and Enrichment of Advanced Learners

**CONSENT  
OCTOBER 22, 2015**

- Burkhart Center for Autism Education and Research
- TTU Center for Undergraduate Research
- Supervise the upkeep, distribution, and curriculum development of HHMI Traveling Labs to regional teachers
- Serve as a liaison between CISER and other community partners

**Secondary Science and English Teacher**

- OL Slaton Junior High  
1602 32<sup>nd</sup> Street, Lubbock, TX 79405
- Pre AP Biology 1999-2000
  - Seventh Grade Pre AP Science 1998-2000
  - Seventh and Eighth Grade TAAS Acceleration/Remediation 1997-1999
  - Seventh and Eighth Grade English 1997-1998

**Education**

- Boise State University Boise, ID
- Pursuing EdD in Curriculum and Instruction 2014 – current

Texas Tech University Lubbock, TX

- MS, Multidisciplinary Science Education 2008
- BA, English Major- Biology Minor 1996

**Certifications**

- Texas
- Secondary Life and Earth Science Standard Certification 2001- current
- Secondary Science Composite Standard Certification 2001- current
- Gifted and Talented Certification (30 hours + 6 update hours each year) 1998 – 2013
- Secondary Biology Certification for Grades 6-12 LIFE
- Secondary English Certification for Grades 6-12 LIFE

**Presentations and Curriculum Development**

- Presenter, Vision Charter School, Caldwell, ID (1hr) 2015  
*Science is ... An Exploration of the NGSS Performance Standards*
- Co-presenter, Texas Tech University College of Education – Capstone Class (1hr) 2013  
*Doing MORE with Less: Better Management through Organization, Relationships, and Engagement*
- Presenter, Frenship High School Best Practices Academy (1hr) 2012  
*Making Connections in the Classroom with Paul McCartney, Joan of Arc, Julius Caesar and Luke Perry*
- Co-Presenter, Frenship High School Best Practices Academy (1hr) 2012  
*Mission Possible: Tiger Protocol - Helping New Teachers Survive the “First” Year*
- Presenter, Region 17 Education Service Center (12hr) 2012  
*Biology EOC Success*
- Co-Presenter, Texas Regional Math & Science Collaborative Annual Conference (1hr) 2012  
*Teachers – Patrons of Creativity in the Classroom*
- Presenter, TTU-NSTA Student Chapter Meeting (1hr) 2011  
*Viva Vocabulary – Concept Circles*
- Speaker, Texas Tech University College of Education- Capstone Class (1hr) 2011  
*Borrowed Bits of Wisdom for Future Educators*

**CONSENT  
OCTOBER 22, 2015**

- Co-Presenter, Conference for the Advancement of Science Teachers (CAST) (1hr) 2010  
*Biology Activities for Beginning Teachers*
- Presenter, TTU-NSTA Student Chapter Meeting (1hr) 2010  
  
*Estemetrics – Making Measurement Fun in the Science Classroom*
- Co-Presenter, Region 17 Education Service Center (12hr) 2010  
*Biology EOC Success*
- Co-Presenter, Texas Regional Math & Science Collaborative Annual Conference (1hr) 2010  
*Engaging Students in Ethical Conversations*
- Co-Presenter, South Plains Education Resource Collaborative (SPERC) (1hr) 2010  
*Using Art to Engage Students in Hands-on Science Exploration*
- Co-Presenter, American Association of University Women (AAUW) (2hr) 2010  
*Mothers and Daughters Program – The Chemistry of Perfume*
- Co-Presenter, Region 17 Education Service Center (6hr) 2010  
*Engaging All Biology Students With Hands-On Learning*
- Co-Presenter, Region 17 Education Service Center (6hr) 2010  
*FOSS – Elementary Magnetism and Electricity*
- Co-Presenter, Region 17 Education Service Center (6hr) 2010  
*Texas Regional Math and Science Collaborative - Elementary Chemistry*
- Presenter, Region 17 Education Service Center (6hr) 2010  
*Meeting the Needs of Gifted and Talented Students in the Science Classroom*
- Presenter, National Science Teacher Association National Conference (1hr) 2010  
*Biology Activities for Beginning Teachers*
- Presenter, National Science Teacher Association National Conference (1hr) 2010  
*Science Connections are Everywhere – Elementary Literature and Science Connections*
- Presenter, 2<sup>nd</sup> Annual Lubbock ISD Quadrant IV Mini Conference (1hr) 2009  
*Cruising Into a Successful Year in Science*
- Presenter, Frenship Middle School (3hr) 2009  
*Using True Colors in the Classroom*
- Presenter, Science Spectrum (18 hr) 2009  
*CSI Summer Camp*
- Co-Presenter, CISER - Science Teacher Academy Summer Professional Development 2009  
*Elementary Life Science Favorite Activities (6hr)*  
*Elementary Earth Science Favorite Activities (6hr)*  
*Elementary Physical Science Favorite Activities (6hr)*
- Co-Presenter, South Plains Education Resource Collaborative (SPERC)(1hr) 2009  
*Elementary Science Activities*
- Speaker, West Texas Association for Supervision and Curriculum Development (1 hr) 2009  
*Helping New Teachers Move From Surviving to Thriving in the Classroom*
- Presenter, Frenship High School Ready, Set, Teach (1hr) 2009  
*Concept Building: Teaching Light and Optics K-12*
- Presenter, National Science Teachers' Association National Conference (1hr) 2009  
*Fun Formative Assessments for the Biology Classroom*
- Co-Presenter, Wheatley Elementary TAKS Science Stars (1hr) 2009  
*Bouncing Balls and Slime Oh My!*
- Co-Presenter, CISER Science Teacher Academy: New Teacher Training (6hr) 2009  
*Surviving to Thriving – Classroom Management*
- Co-Presenter, Wayland Baptist University (3hr) 2009  
*Saving our Sanity – Formative Assessment in the Science Classroom*
- Presenter, Texas Association of Future Educators (TAFE) Regional Conf. (1hr) 2008

**CONSENT**  
**OCTOBER 22, 2015**

*Favorite Activities and Best Practices to Increase Understanding in the Secondary Classroom*

- Co-Presenter, Harwell Elementary Science Day (2hr) 2008  
*Light and Color*
- Co-presenter, Brown Elementary (2hr) 2008  
*CISER Tiny Tot Tubs – Living and Non-living*
- Co-Presenter, All Saints Episcopal Elementary Science Teacher Training (6hr) 2008  
*FOSS- Exploring the K-5 Curriculum*
- Presenter, State Small Schools GT Conference Region 17 ESC (1hr) 2008  
*Differentiating in the Science Classroom – Meeting the Needs of Advanced Learners*
- Presenter, WTAMU 15<sup>th</sup> Annual Math and Science Conference (1hr) 2008  
*Fun, Formative Assessments II*
- Co-Presenter, Lubbock ISD Elementary Teacher Training (1hr) 2008  
*Seasons of Change*
- Presenter, TTU T-STEM Summer Professional Development (12 hr) 2008  
*Body Systems – Traveling Lab Training*
- Co-Presenter, Texas Regional Collaborative Annual Conference (1hr) 2008  
*Fun, Formative Assessments I*
- Co-Presenter, Region 17 Education Service Center (3hr) 2008  
*TAKS Share-a-thon*
- Presenter, Conference for the Advancement of Science Teachers (1 hr) 2007  
*Activities to Help Students Think Critically About Ecology and Evolution*
- Presenter, Texas Regional Collaborative Annual Conference (1 hr) 2007  
*Ecology Activities for Everyone*
- Texas Regional Collaborative Instructional Team Member (ITM) 2007  
*Co-Presenter Bridging to TAKS K-8 Matter – 6 hours*
- Texas Regional Collaborative Instructional Team Member (ITM) 2006-07  
*Co-Presenter Bridging to TAKS K-8 Light and Optics – over 60 hours*
- Co-Presenter, Conference for the Advancement of Science Teachers (1hr) 2006  
*Biology of Disaster*
- Co-Presenter, Region 17 Education Service Center “Flex Your TEKS” (3hr) 2006  
*Forget Pirate Treasure ... We’ve Found Gold in Texas Elementary Science Classrooms*
- Presenter, “TEKS Alive! GT in the Content Areas” (1hr) 2005  
*Meeting the Needs of Gifted and Talented Students In the Science Classroom*
- Presenter, Frenship Junior High Science Pre AP Training (12hr) 2000
- Presenter, Core Knowledge National Conference – Anaheim, CA (2hr) 2000  
*Cool Chemistry*  
*Character Building Through Core Knowledge*
- Presenter, Quadrant II Math and Science Workshop (1hr) 1999  
*Red Eye for Snake Eye and Other Intoxicating Experiments*
- Presenter, Quadrant II Vertical Teaming Conference (1hr) 1998  
*TAAS, TEKS, and You!*

**Awards and Honors**

- Who’s Who Among American Teachers 2002-2007
- Texas Association of Biology Teachers (TABT) Outstanding Biology Teacher 2007
- Science Teachers Association of Texas (STAT) & Texas Medical Association (TMA) Outstanding High School Science Teacher
- AT&T Distinguished Mentor Award/Texas Regional Collaborative 2006
- National Honor Roll’s Outstanding American Teacher 2006

**CONSENT  
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- Texas Tech University College of Education Tribute to Teachers 2004
- Region 17 Secondary Teacher of the Year 2003
- Frenship ISD Secondary Teacher of the Year 2003
- KCBD Teacher You Can Count On 2000

**Additional Educational Experience**

- Inquiry Roundtable Discussant Fall 2014, Spring 2015
- Idaho State Department of Education Science Content Standards Executive Committee Spring 2015
- IDoTeach Recruitment and Retention Steering Committee Spring 2015
- Teacher Education & Professional Year Admission Committee Fall 2014
- Elementary Science Faculty Search Committee Fall 2014
- Supervising/Mentor Teacher of Secondary Field-Based Students 1998-2008, 2010-2012
- New Teacher Mentor & Morale Committee 2011-2013
- TTU College of Education Middle School Math & Science (MS2) Research Conference Panel Member 2010  
*"The Importance of Research Experience for Secondary Science Teachers"*
- Women in Scientific Endeavors- Spring Workshop 2010
- Frenship ISD Master Plan Committee 2006-2008
- Superintendent's Advisory Council 2006-2007
- Texas Tech University Panel Member 2005, 2006  
*"Give Teaching A Chance"*
- Texas Education Agency TAKS Field Question Data Analysis Panel Member 2005
- Curriculum Mapping Institute Training- Heidi Hayes Jacobs 2004, 2005
- Region 17 Education Service Center Panel Member 2004  
*"The Early Years: Becoming an Excellent Teacher"*
- Participant- Texas Teacher Forum 2004
- Texas Education Agency TAKS Question Review and Analysis Panel Member 2003
- Campus Performance and Objectives Committee 1998-2003
- Woodrow Wilson Fellowship 2002  
*"Genetics, Genethics, Genomics"*
- Advanced Placement Biology Training 2002
- International Baccalaureate Training 2000
- Core Knowledge Curriculum Council- OL Slaton 1998-2000

**Professional Affiliations**

- Association for Supervision and Curriculum Development (ASCD)
- Idaho Science Teachers Association (ISTA)
- National Science Teachers Association (NSTA)
- Science Teachers Association of Texas (STAT) 2004-2013  
Vice President 2008-2009  
Awards Committee Member 2010-2011  
Workshop Review Committee Member 2011-2012
- Society for the Advancement of Chicanos and Native American Scientists (SACNAS)  
Advisory Board Member 2009-2010
- Star 17 Science Teachers Association (STAR 17)

**CONSENT  
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Secretary 2006-2007

- Texas Association of Biology Teachers (TABT)
- Past President 2011-2012
- President 2010-2011
- President Elect 2009-2010

### **Sponsorships**

- Skills USA Crime Scene Investigation Team Sponsor 2012-2013  
1<sup>st</sup> place Regional Competition
- NHS Co-Sponsor 2002-2004
- Cheerleading Sponsor 2000-2002
- UIL Science Sponsor 1998-2000, 2004-2005
- Odyssey of the Mind/Destination Imagination Sponsor 1997-2000

### **Community Involvement**

- Guest Presenter– Camp Learn A Lot at Prospect Elementary May 2015  
*Science in the Sun = Summer Fun*
- Guest Teacher– 2<sup>nd</sup> Grade CD Andrus Elementary Science (Mrs. Barry/Mrs. Smith) 2014-2015  
*Changes: Making Observations – Solids, Liquids, and Gas*  
*Changes: How Fast Can You Make Matter Change?*  
*Changes: Do You Hear What I Hear – How Sound Travels Through Matter*  
*Engineering: Building a Better Snowball Catapult*  
*Biomes and Adaptations: Mealworm Habitats*  
*Celebrating Science: Groundhog Day and Shadows*  
*Biomes and Adaptations: Camouflage*  
*Biomes and Adaptations: You're Getting Warmer – Feathers, Blubber and Fur*  
*Biomes and Adaptations: Animal Olympics*
- Science Night Coordinator– CD Andrus Elementary  
Fall 2013  
Spring 2015
- Science/Wonder Fair Coordinator– CD Andrus Elementary Spring 2015
- Garden Advisory Committee– CD Andrus Elementary Spring 2015
- Guest Teacher– 5<sup>th</sup> Grade CD Andrus Elementary Science (Mr. Lee Fischer) Spring 2014  
*Living, Non-Living, or Never Been – Why?*  
*Plant vs. Animals Cells – Compare/Contrast/Classify*  
*It's a Small World After All – Using Microscopes*  
*Structures and Functions of Plant and Animal Cells*  
*Colanders, Coffee Filters, Tennis Racquets, and Cells – What is the Connection?*
- Guest Teacher– 1<sup>st</sup> Grade CD Andrus Elementary Science (Mrs. Trena Savoie) 2013 – 2014  
*Seasons of Change – Exploring Leaves and Trees in the Fall*  
*A Snowy Day Celebration – Making Crystal Snowflakes*
- Assisted Micron K-12 Programs Coordinator, Cathy Ammirati Fall 2013  
*Atoms and Molecules – 5<sup>th</sup> grade CD Andrus Elementary*
- Science Fair Judge– Local and Regional 2002-2010

**Melyssa Ferro**

311 W Spruce St.  
Caldwell, Idaho 83605  
208-455-7826

[Mferro@caldwellschools.org](mailto:Mferro@caldwellschools.org)

**Career Objective:**

To create citizen scholars who have the critical thinking skills necessary to be successful in making decisions about their planet and their futures.

Certification:

Idaho Education Credential: Standard Secondary: Biological Science 6-12, Natural Science 6-12

Education:

- Masters of Science: Middle Level Education, Walden University, online 2006
- Bachelors of Science: Biology, Secondary Education, Boise State University, Boise, Idaho 1999

**Teaching Experience:**

- Elementary Science Methods Instructor, College of Idaho, Caldwell, Idaho Spring 2010-present
- Science Teacher, Life & Earth Science, Syringa Middle School, Caldwell, Idaho Fall 2000-present
- Science Teacher, Biology & Physical Science, Caldwell High Summer School, Caldwell, Idaho Summer 2004
- Science Teacher, Biology & Physical Science, Ridgecrest High School, Nampa, Idaho Summer 2000
- Science Teacher, Biology & Physical Science, Nampa High Night School, Nampa, Idaho Spring 2000

**Related Experience:**

- Table Leader, Idaho STEM Summit, Idaho State Board of Education, Summer 2015
- Idaho Science Standards Adoption Committee, Middle School Chair, Idaho State Department of Education, Spring 2015
- District STEM Coordinator, Caldwell School District #132, 2014-present
- Lead Teacher, Expedition Yellowstone Fieldtrip, Caldwell, Idaho 2014-present
- Department Chair, Syringa Middle School, 2013-present
- Lead Teacher, Future City Project, Caldwell, Idaho 2012-present
- Independent Contractor, Idaho State Department of Education, 21st Century Lesson Plan Master Teacher, 2012
- Science Bowl Coach, Syringa Middle School, Caldwell, Idaho 2011-present
- Lead Teacher, Disney Planet Challenge Project, Caldwell, Idaho 2010-2012

**CONSENT**  
**OCTOBER 22, 2015**

- Group Leader, Habitat H2O Science Fieldtrip, Caldwell, Idaho 2009-present
- Cooperating Teacher, College of Idaho, Student Teaching Program, 2009, 2014
- After School Tutoring, Syringa Middle School, Caldwell, Idaho Fall 2004-present
- Idaho Youth Games Volunteer, Caldwell, Idaho Summer 2003- Summer 2008
- Instructional Aide, Syringa Middle School, Caldwell, Idaho Spring 2000
- Substitute Teacher, Caldwell School District, Caldwell, Idaho Fall 1994-Fall 1999

**Professional Association Memberships & Involvement:**

- Treasurer, Caldwell Education Association, 2007-present
- Delegate, Delegate Assembly, Idaho Education Association 2001-present
- National Education Association 2000-present
- Idaho Education Association 2000-present
- Caldwell Education Association 2000-present
- National Science Teachers Association 2000-present
- Resolutions Committee, Region 8 Representative, Idaho Education Association, 2006-present
- Negotiations Team, Lead Negotiator, Caldwell Education Association, 2010-2011
- Idaho Middle Level Association 2005-2007
- Vice President, Caldwell Education Association, 2005-2007

**Awards:**

- Teacher of the Year, Syringa Middle School, Caldwell, Idaho 2006-2007, 2014-2015
- State Level Finalist for Idaho, Presidential Awards for Excellence in Mathematics and Science Teaching 2009, 2013
- Region III Outstanding Secondary Science Teacher of the Year, Idaho Science Teacher Association, 2007-2008
- Secondary Teacher of the Month, Syringa Middle School, Caldwell, Idaho October 2005

**Professional Preparation/Development:**

- iSTEM Summer Middle School Conference, Idaho, 2009-present
- Caldwell School District Science Institute, Organizer and Presenter, Summer 2015
- Visible Learning Conference, Minnesota, Summer 2015
- STEM Innovations Conference, University of Idaho, Presenter, Summer 2015
- Common Core Standards Implementation Professional Development, Presenter, Spring 2013
- College Board Vertical Teaming Training, Spring 2013
- Grant Coordinator, Increased Science Learning with 21<sup>st</sup> Century Tools Grant, 2012-present
- Summer Math and Science Institute, Organizing Committee, Caldwell, Idaho 2009-present
- Mathematics and Science Partnership Grant Committee, Boise, Idaho 2009-2010

**CONSENT**  
**OCTOBER 22, 2015**

- Coordinated School Health Council Member, Syringa Middle School, Caldwell, Idaho 2009-present
- Building Site Council Member, Syringa Middle School, Caldwell, Idaho 2001-2011
- JASON workshop, Monster Storms, Spring 2009
- Critical Learning Skills in the 21<sup>st</sup> Century: Collaboration for Student Success, Spring 2009
- Lead Grant Writer, Idaho National Laboratories STEM Mini Grant, Syringa Middle School, Caldwell, Idaho Spring 2009
- Peer Mentoring, Professional Learning Teams Fall 2008-Spring 2009
- Professional Book Study Group, Syringa Middle School, Caldwell, Idaho Fall 2007-Spring 2008
- Highly Effective Questioning, Professional Learning Teams Fall 2007-Spring 2008
- Data Review, Idaho Standards Achievement Test, Data Recognition Corp May 2007

## Catherine Griffin

582 E. Boise Avenue, Suite157  
Boise, Idaho 83706  
208.867.5820

[csmith.boise@gmail.com](mailto:csmith.boise@gmail.com)

**Objective:** Curriculum Committee: Social Studies

### **Experience:**

- Heritage Community Charter School, Caldwell, ID 3/2013 - Present
- K-12- Resource Room Teacher /Co teach social studies 6-8
- Boise School District: Teacher 8/2007- 8/2012
- Resource Room Teacher- Co taught 4<sup>th</sup> grade social studies
- Boise Language Center: Volunteer Tutor 11/2011 - 4/2012
- Agency for New Americans: Volunteer Tutor 08/2010 - 06/2011
- Nampa School District: Teacher 2/2003- 8/2007
- Resource room teacher/ Enrichment teacher: Taught Gifted & Talented Social Studies
- Caldwell and Boise School District: Social Studies Teacher High School Internships 11/2003 to 06/2005
- Mountain Cove Night School; Mountain Cove Day School; Canyon Springs Alternative Program

### **Skills and Qualifications:**

- Co- taught social studies to Middle School.
- Participated on evaluation teams to enhance student learning.
- Staff development and training for three or more support staff
- Supported Modification and Accommodations for student access.
- Effective written and oral communication skills.
- Research Skills: Preparation of reports for student evaluation reports.
- Use of office software tools: Microsoft Office, Internet, Excel, PowerPoint

### **Education:**

- Master of Education, Education: Special Education, Boise State University, 2007
- Master of Arts, Education: Curriculum & Instruction, Boise State University, 2006
- Bachelor of Arts, Anthropology: Boise State University, 1997

### **Professional Development/ Certifications:**

- Standard Secondary Social Studies Grades 6-12: Boise State University, Idaho; 2013- 2018
- Standard Teaching Certificate: Special Education Generalist K-12: Boise State Univ. ID, 2013- 2018

**Other Professional Development:**

- Endorsement: English Language Development (ELD/ELL) K-12: College of Idaho, Caldwell, Idaho, 2012
- Endorsement: Literacy/ Reading Specialist K-12: Boise State University, Boise, Idaho, 2008
- Endorsement: Gifted and Talented K-12, Boise State University, Boise Idaho, 2008
- Certification: Multicultural Facilitator: Boise State University, 2007

## Tauna Johnson

Genesee Elementary School  
1216 Spruce Circle  
Moscow, Idaho 83843  
509-336-1667  
[tjohnson@sd282.org](mailto:tjohnson@sd282.org)

### Education Background

Bachelor of Arts, Elementary Education - Eastern Washington University  
Major: Reading Minor: Math  
Masters of Education - University of Idaho  
Masters Project: Alternative Assessments of Hands-On Science

### Certificates

Idaho Standard Teaching Certificate  
Endorsements: K-8 All subjects, K-12 Reading  
National Board Certified Teacher - Initial Certification: 2000 Renewed: 2010

### Employment History

1989-Present - 5th grade teacher - Genesee Elementary School - Genesee, Idaho  
1988-1989 - Lead Teacher - Lewis/Clark Head Start - Clarkston, Washington  
1987-1988 - Substitute Teacher - Kittitas School District - Kittitas, Washington

### Awards

2015 - Idaho Teacher Selected to Mickelson ExxonMobil Teachers Academy  
2012 - Presidential Award for Excellence in Mathematics and Science Teaching -  
Elementary Science - Awarded by the White House and National Science Foundation  
2012 - Governor's Industry Award for Notable Teaching in STEM (GIANTS) Honorable  
Mention - Awarded by Idaho Governor Butch Otter  
2001 - Reading Renaissance Model Classroom - Awarded by School Renaissance  
Institute  
1995 - Idaho Regional Outstanding Science Teacher—Awarded by Idaho Science  
Teachers Association

### Professional Memberships

Idaho Science Teachers Association  
National Science Teachers Association  
Idaho Council for Teachers of Mathematics

### Leadership Roles

2012 - Present - Idaho Science Teachers Association Region 2 Representative  
2000 - Present - District Peer Assistant to New Teachers  
2005 & 2010 - National Board for Certified Teachers Mentor  
2004 - Idaho Direct Writing Assessment Evaluator  
Student Teacher Supervising Teacher - I have supervised 4 student teachers.

### **Committees**

Idaho Science Standards Executive Committee  
District Science Curriculum Committee  
District Technology Committee  
District Professional Development Committee  
District RTI (Response to Intervention) Team  
District SWPBIS (School-Wide Positive Behavior Intervention System) Leadership

### **Professional Development Experiences**

Specialized Advanced Science Courses  
Teaching for Excellence in Science and Literacy Achievement - 2 cr. - LCSC  
ED-CIFS 553 - ISTEM Summer Institute - 2 cr. - Boise State University  
EDCI 505 - GK-12 Project/Training - 18cr. - University of Idaho  
EDTE - Implementing/Align Science Curriculum - 1 cr. University of Idaho  
ED 504 - ST: Idaho TRAILS (Topically Relevant Approaches to Increase Learning in Science) - 10 cr. - University of Idaho

### **Workshops and Trainings**

2011 - Idaho Education Network - Video Teleconference System Training  
2010 - 9 Essentials of Love and Logic  
2009 - Mathematical Thinking Initiative Training  
2006-2009 - National Science Foundation - GK-12 STEPS (Scientists and Teachers Educating and Preparing Students) - I was one of 10 Idaho teachers selected for this program. I worked with University of Idaho science graduate students over a 3 year period on improving their science communication skills. The graduate students then helped me improve physical science inquiry and STEM instruction in my classroom.  
1999 - Teaching with Technology - Technology Competence Certificate  
Local, State, and National Conferences  
2014 - Idaho Science Teachers Association / Idaho Council for Teachers of Mathematics Conference - Boise, Idaho - I presented "Hands-On Inquiry Science on a Budget."  
2011 - Northwest Council for Computer Education Regional Conference - Portland, Oregon - Conference attendee  
2009 - Sound Grading Practices Conference - Portland, Oregon - Conference attendee  
2007 - National Science Foundation GK-12 Annual Conference in Washington DC  
I was the teacher representative for University of Idaho and participated in a poster presentation on STEPS (Scientists and Teachers Educating and Preparing Students).  
2003 - Idaho Math Academy - Moscow, Idaho - Conference attendee  
1994 - National Science Teachers Association (NSTA) Convention - Anaheim, CA  
I was selected to present on "Space Night: Starring Your Students and Community."  
1994 - Idaho Teachers Excited About Cruisin the Heavens (ITEACH) - Boise, ID  
I presented to Idaho teachers on how to successfully plan, organize, and conduct a community star night.  
1993 - National Science Teachers Association (NSTA) Convention - Kansas City, MO  
I was selected to present "Bringing the Community into the Rural Schools."

**CONSENT  
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**Grants**

2015 - Steelhead Release Day - \$350 - Genesee Education Foundation - I received funds for my students to take a field trip to Clearwater River and release the steelhead they raised in the classroom.

2014 - Tears of Joy Puppet Performance - \$650 - Latah County Arts & Culture Committee - I wrote and received this grant for professional puppeteers to perform *20,000 Leagues Under the Sea* to our K-6 students.

2013 - Family Engineering Night - \$560 - Genesee Education Foundation - I received funds to purchase supplies for a K - 6 Family Engineering Night. I also requested and received a donation from Schweitzer Engineering Laboratory for \$500 to help purchase more supplies.

2012 - Bulldog Broadcast Technology Equipment - \$750 - Genesee Education Foundation - I wrote funds to purchase a camcorder and other technology equipment for my students to use in creating an elementary news broadcast.

2012 - STEM Extreme Classroom Makeover Grant \$10,000 - INL - Idaho National Laboratory - "Engineering a Clean Environment" - I co-wrote and received this grant to purchase supplies for a school-wide recycling system.

2012 - Virtual Field Trips \$465 - Idaho National Laboratory - I wrote and received this grant to purchase three virtual science field trips for my class.

2011 - 5th Grade Field Trips \$478 - Genesee Education Foundation - I wrote and received this grant to pay for bus transportation for science field trips and for an outreach program to bring "Robotic LEGOS" to my classroom.

2010 - Science on Ice - \$314 - Genesee Education Foundation - I wrote and received a grant to pay for transportation to a local ice rink where a scientist from Decagon Devices, a local company who manufactures and markets scientific instruments, taught students about Newton's Laws of Motion, physical properties, and rotational momentum.

2009 - Supplies for Hands-On Science Learning - \$456 - Genesee Education Foundation - I wrote and received a grant to purchase balance scales, density blocks, and microscopes for our elementary school.

2008 - Elementary Projectors and Screens - \$9,976 - Nez Perce Tribal Education Program - I co-wrote this grant with two other elementary teachers. We received funds to purchase a ceiling-mounted projector and screen for every elementary classroom in our school.

## Zoe Ann Jorgensen, NBCT; M.Ed.

zoes.home77@gmail.com

1363 Nixon Ave, Idaho Falls, Idaho 83404

H 208-524-7285 C 208-520-4324

### EDUCATION

- 2004-2006 Idaho State University  
Masters of Education: Instructional Technology
- 1981 - present Accumulated post graduate non-degree seeking credits  
Idaho State University:  
Boise State University  
University of Idaho  
Brigham Young University  
Northwest Nazarene University: ,
- 1979 -1981 Brigham Young University / Bachelor of Science Degree, Major: Educational  
Psychology/Elementary Education
- 1977 - 1979 Ricks College / Associates of Arts and Science Degree, Major: General Studies

### WORK EXPERIENCE

- 1983 - Present Educator Idaho Falls School District 91  
Teaching Experience Idaho Education Certificates: Elementary Education K/8, Special  
Education K/12
- Spectrum Program (multi-age), Intermediate level grades 4,5,6 (24 years)  
6th grade (2 years)  
Special Education, Resource Program (7 years)
- Extra Curricular Experience
- Building computer specialist
  - Building science coordinator
  - Chair person of annual school wide Theme Night/Science Fair
  - Mentor to in-service and pre-service teachers
  - State Science Standards team member
  - Facilitator National Energy Education Development project
  - Instructor of in-service classes : Computer Integration, Science Notebooks, IFEA  
leadership, Astronomy and StarLab, Energy, Ecosystems, A T-Rex Named Sue,  
Space Shuttle Simulation Workshop, NASA space workshop,
  - Coordinator of district Space Shuttle simulation program
  - Local organizer for the "IRIS" space exploration workshop
  - District science curriculum committee member
  - Presenter at Idaho Science Teachers Association annual conference
  - Organizer of district wide NASA assemblies and in-service
  - Organizer of numerous area wide astronomy workshops
  - Organizer for the Utah State University Junior Engineering program
  - Member of the Idaho NBPTS Initiative leadership team,
  - Mentor to National Board candidates
  - Presenter at the NBPTS annual conference
  - National Board for Professional Teaching Standards scorer
  - Facilitator for the Idaho Classrooms of Accomplished Teachers mentoring program,
  - Student Council advisor,
  - IFEA treasurer
  - IFEA vice president
  - Delegate to IEA assembly
  - Representative to NEA assembly

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Presenter for IEA Leadership training

- 2006-2014 Idaho State University  
Adjunct instructor – Integration of Technology EDUC 3311  
Adjunct instructor – Elementary Math Methods EDUC 3330  
Adjunct instructor – Elementary Science Methods EDUC 3331
- 2006 – 2015 Museum of Idaho  
Organizer/instructor for junior level Rocky Mountain Adventure Camp  
Instructor for Educator/Adult Rocky Mount Adventure Summer Training  
Volunteer presenter for Discovery Days program
- 1976 - Present Fred Meyer/Grand Central Inc.,  
Bookkeeping, data entry, cashiering, and merchandising

**HONORS**

- 2012 Received NSTA/Vernier Award for Innovative use of Technology in Science Teaching.  
Named Outstanding Environmental Educator by EIEEEA  
Named as Idaho state finalist for the Presidential Award for Excellence in Mathematics and Science Teaching.
- 2008 Named as Idaho state finalist for the Presidential Award for Excellence in Mathematics and Science Teaching.  
Selected to be a member of the Boise State University Educational Leadership Cohort to Japan.
- 2007 Achieved National Board Recertification
- 2004 Received the Governor's Industry Award for Notable Teaching in Science  
Awarded science instructional grant from the Space Grant Consortium
- 2003 Awarded the INEEL Community Partners' grant for a math and science program at Bush Elementary  
Nominated for Teacher of the Year, awarded by The Post Register of Idaho Falls, Idaho.  
Idaho Governors Industry Award for Notable Teaching in Science, Honorable Mention
- 2002 Selected to be a member of the National Board for Professional Teaching Standards/People to People delegation to New Zealand and Australia.
- 2001 Selected to be a member of the National Board for Professional Teaching Standards/People to People delegation to the Republic of China.
- 2000 Awarded Albertson Community Grant for StarLab planetarium and Astronomy workshops
- 1999 Honored by Senator Mike Crapo during his Teacher Appreciation Week Address.
- 1998 Achieved National Board Certification  
Apple for the Teacher Award, nominated by a student, awarded by the Standard-Examiner of Ogden, Utah.
- 1997 Received Albertson grant for National Board Certification
- 1996 Awarded TCI Cable grant to attend the Sparkman Center for Education Technology  
Awarded Idaho Falls CHC Foundation's grant for technology in the classroom
- 1994 Selected to participate in Discovery Center of Idaho's Project ITEACH

## Lori Conlon Khan

### Education

1982 B.A. (Music Education) Rocky Mountain College, Billings, MT  
2007 M.Ed (Education) Lesley University, Cambridge, MA  
2012 Ed.D (Education) Boise State University, Boise, ID

### Professional Experience

1981-1983 First Congregational United Church of Christ (Billings, MT) Children's  
Choir Director  
1983-1984 Wilder School District – Music Instructor K-12  
1984-present Boise School District – Elementary General Music Specialist  
1985-1995 First Congregational United Church of Christ (Boise, ID) Adult and  
Teen Handbell Choir Director  
1989-2006 Northview Montessori – Preschool/K Music Instructor  
2009-present Lesley University adjunct faculty, Integrating the Arts Masters program  
2009-present Boise State adjunct faculty, Movement, Levels I and II Orff Teacher  
Training Courses

### Description of Teaching Duties

Wilder - Elementary general music classes, junior high and high school band and  
choir, marching band, pep band  
Boise - Elementary general music classes, continuing education classes for staff,  
elementary choir  
Montessori - Preschool and kindergarten music classes  
Boise State - Adjunct instructor, Elementary Music Methods course for music majors  
Movement instructor for Level I and Level II Orff Teacher Training  
courses  
Lesley - Adjunct instructor, Music and Curriculum courses for the Integrating the  
Arts Master's program for working educators

### Awards and Honors

1982 Graduated Summa Cum Laude, Rocky Mountain College  
2007 Graduated 4.0, Lesley University  
2009 Red Apple Award, Boise School District, Excellence in Education  
2010 Boise Rotary Century Scholars, Distinguished Educator

### Unpublished Research

Conlon Khan, L. (2007) *A place where the arts are academic and the academics  
artful: An arts based elementary school in the Boise School District*. Unpublished  
master's thesis. Lesley University, Cambridge, Massachusetts.  
Conlon Khan, L. (2007) *Connecting music, language and reading: A study*  
Unpublished doctoral research. Boise State University, Idaho.  
Conlon Khan, L. & Shapiro, M. (2009) *Children's visual art & metaphor: Descriptions*

- of school.* Unpublished research. Boise State University, Idaho.
- Conlon Khan, L. (2009) *The arts: Another learning language*  
Manuscript submitted for publication. Boise State University, Idaho.
- Conlon Khan, L. (2012). *The beat goes on: The connections between pitch matching and beat competency in the reading proficiencies of third graders.* Doctoral Dissertation. Boise State University, Boise, Idaho.

### **Published Research**

- Nadelson, L., Bonham, M., Conlon Khan, L., DeLaFuentelba, M. Hoetker, G., Hooley, D., et al. (2009). A shifting paradigm: Preservice teacher multicultural efficacy, individual experience, and perspectives. *Urban Education* (2010).
- Conlon Khan, L., McGuire, M. (2014). Reading with rhythm. *Orff Echo* 46(2).

### **Clinic/Workshop Presentations**

- Conlon Khan, L. (1991, January) – Jazzin’ Up the Joint. Workshop presented at Idaho Orff Chapter workshop - Boise Idaho.
- Conlon Khan, L. (1992, June) – My Bag of Tricks for Montessori. Workshop presented at Montessori Teacher Certification Courses – Boise, Idaho.
- Conlon Khan, L. (2005, October) – Jazzin’ Up the Joint, Stomp and Stick To It. Workshop sessions presented at Idaho Orff State Conference – Boise, Idaho.
- Conlon Khan, L. (2006, January) – Stomp, Stick To It, Moovin’ and Groovin’. Workshops presented at IMEA State Conference, Boise State University.
- Conlon Khan, L. (2008, January) – Do You Know The Way To San Jose? A Review of National Conferences, Idaho Orff Chapter Share Workshop – Boise, Idaho.
- Conlon Khan, L. & Schumacher, B. (2010, March)– Sensory Integration Through Music. Workshop presented at IMEA State Conference, Northwest Nazarene University.
- Conlon Khan, L. & McGuire, M. (2013, November) – Reading With Rhythm, AOSA National Professional Development Conference, Research Presentation – Denver, Colorado.
- Conlon Khan, L. & McGuire, M. (2014, March) – Reading With Rhythm. Workshop session presented at IMEA State Conference –Northwest Nazarene University.
- Conlon Khan, L. & McGuire, M. (2014, June) — Reading With Rhythm. Workshop session presented at the Idaho State Delta Kappa Gamma Convention – Boise.
- Conlon Khan, L. (2014, October) – Bzzzz...Common Core and Other Buzz Words: What Does All This Mean?. Workshop presented at Idaho Orff State Conference – Nampa, Idaho.
- Conlon Khan, L. & Goodman, A. (2014, October) – Intro. to Orff Level I. Workshop session presented at Idaho Orff State Conference – Nampa, Idaho.
- Conlon Khan, L. & McGuire, M. (2015, February) – Reading With Rhythm. Workshop session presented at All-Northwest NafME Conference – Spokane, WA.
- Conlon Khan, L. & McGuire, M. (2015, March) — Reading With Rhythm. Workshop session presented at the Early Childhood Educators Conference, College of Southern Idaho —Twin Falls, Idaho

**Specialized Course Work**

- 1990 Level I Orff Certificate – Northwest Nazarene University, Nampa, Idaho  
2003 Level II Orff Certificate – University of Nevada, Las Vegas  
2005 Level III Orff Certificate – University of Nevada, Las Vegas
- 2007 Master Class Orff Certificate – University of Memphis, Tennessee  
2007 Idaho Humanities Council Summer Institute Fellow, New Harmonies:  
Exploring American Roots Music - Albertson College of Idaho, Caldwell, Idaho  
2012 Master Class, Movement Instructors – National AOSA Conference, St. Louis,  
Missouri  
2013 National Endowment for the Humanities Summer Institute Fellow, The Most  
Southern Place On Earth: Music, Culture, and History of the Mississippi Delta -  
Delta State University, Cleveland, Mississippi  
2014 National Endowment for the Humanities Summer Institute Fellow, Duke Ellington  
and Popular Culture – Fairfield University, Fairfield, Connecticut  
2015 Idaho Humanities Council Summer Institute Fellow, The Harlem Renaissance -  
College of Idaho, Caldwell, Idaho

**Distinguished Service to the Boise School District**

- 2002-present Continuing Education Teacher, Elementary Music Topics  
2005-2007 Boise School District Elementary Music Curriculum Realignment  
2004-2005 Horizon School Peace Pole Project, founder  
2004-present Horizon School Improvement Project Team  
2007-2008 Horizon Professional Learning Community Leadership Team  
2013 Idaho Sesquicentennial Celebration Performance, Choir and  
Percussion Ensemble, director  
2013 Boise School District Elementary Music Standards Review Team  
2014-2015 Boise School District Mentor

**Membership in Professional Organizations**

- 1984-present Idaho Orff  
1984-present Boise Education Association  
1984-present National Education Association  
1990-present American Orff Schulwerk Association  
2006-present National Association for Music Education  
2006-present Idaho Music Educators Association  
2004-present American Choral Directors Association  
2005-present Delta Kappa Gamma  
2008-2012 Phi Kappa Phi – Boise State University  
2012-2014 Kappa Delta Phi - Boise State University

**Committee Service**

- State Department of Education  
Elementary General Music Curriculum – 2005

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Arts Schools Administrators/Educators Committee – 2008  
Common Core Standards Review Committee, Music – 2013, 2014  
American Orff Schulwerk Association  
National Advisory Board – 2005-2008  
National Conference Boutique Co-Chair, Spokane – 2010  
Region I Representative, National Advisory Board, 2012-2015  
Research Committee  
Financial Assistance Committee  
Communications Committee, Chair  
50<sup>th</sup> Anniversary Celebration Committee, Co-Chair

**Offices Held**

**State:**

Idaho Orff Chapter Publicity, 1993  
Idaho Orff Chapter Historian, 1998-2004  
Idaho Orff Chapter Vice-President, 2004-2005  
Idaho Orff Chapter President, 2005-2008

**National:**

AOSA National Conference Co-Chair (Boutique), Spokane 2010  
AOSA Region I Representative, National Board of Trustees, 2012-2015

**Sharon Tennent**

sharon.tennent@boiseschools.org  
198 N Al Fresco Place  
Boise, Idaho 83712  
(208) 860-0820

**ACADEMIC PREPARATION**

**Master of Arts in Education, Reading**, Boise State University, December 2008  
**Bachelor of Arts, Elementary Education**, Boise State University, December 1997  
**Bachelor of Business Administration**, University of Memphis, August 1989

**PROFESSIONAL TEACHING EXPERIENCE**

**Idaho Mathematics Curricular Materials Reviewer** March 2015 – June 2015

**K-6 Math Coach** – Boise Independent School District March 2015 – Present

**Assistant Trainer** - Riyadh, Saudi Arabia December 2014  
Lead NGSS/STEM Trainer for female KSA Science Center Instructors

**Second Grade Math Liaison** - Boise Independent School District 2013 – Present

**Assistant Presenter** - Boise Independent School District March 2012  
Connecting CCSS-M to District Standards

**Presenter**- Boise Independent School District Spring 2012  
Common Core State Standards: Math K-2

**Presenter** – BSU Teacher Methods class (Social Studies) Fall 2011 and Spring 2012  
Formative and summative assessment in the classroom *Presentation requested by Dr. Sara Fry*

**Instructional Leadership Team Member** 2011 – Present  
Owyhee Elementary School, Primary

**Look to Learning Team Member** 2011 – Present

**Teacher-2nd Grade** – Boise Independent School District 2004 – Present  
Owyhee Elementary School

**AWARDS**

**Mentors of the Year Award** - Boise State University September 2011

## Darlene Matson Dyer

P.O. Box 1981  
Hailey, ID 83333  
Phone: 208/788-4318  
Cell: 208/721-0376  
E-mail: [ddyer331@gmail.com](mailto:ddyer331@gmail.com).

### Education and Certifications

National Board for Professional Teaching Standards Certification, 2000-10:  
Adolescence and Young Adulthood/English Language Arts  
Idaho Standard Teaching Certificate, University of Idaho, 1979-current  
Endorsements: Secondary English, Reading, Journalism  
Bachelor of Arts degree (with honors) in English Literature, University of Illinois at Chicago, 1975

### Teaching Experience

August 2002 – 2014: English teacher/newspaper advisor and Teaching Academy Instructor, Writers' Club Advisor, Wood River High School, Blaine County School District No. 61, Hailey, Idaho.  
August 2001 - May 2002: Teacher in Residence, College of Education Instructor, Idaho State University  
(Motivation & Management; Careers in Education; Planning, Delivery & Assessment), Pocatello, Idaho.  
August 1990 - 2001: English teacher, Wood River High School, Blaine County School District No. 61, Hailey, Idaho.  
August 1982 - June 1990: English teacher, English Department Chairman, Wood River Junior High School, Blaine County School District No. 61, Hailey, Idaho.  
June - August 1979 - 1993: Teacher of Study Skills, Reading, and English; Photography & Typing teacher, Upward Bound (summer program), University of Idaho, Moscow.  
August 1980 - May, 1981: Basic Skills Teacher, Butte County High School, Joint District No. 111, Arco, Idaho.  
March - May 18, 1979: Student teaching practicum: American Drama, Senior Comp., Speech, Diversified Reading, Moscow High School, 401 East Third Street, Moscow, Idaho.

### Professional Development

Committee Member: Blaine County School District Strategic Planning, spring 2015  
Participant: Network for Public Education Conference, Chicago, April 2015  
Testifier: Idaho House Ed Committee Hearing re HB 226 (Career Ladder), Boise, March 2015  
Participant: Charlotte Danielson Conference, Portland, Oregon, March 2015  
Item Reviewer: Idaho Assessment System Bias and Sensitivity for Math and ELA, Boise, 2014-15

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Trainer: Idaho Education Association Charlotte Danielson Evaluation Toolkit, Region 4, 2014-2015  
Program Proposal Reviewer: National Council of Teachers of English (for fall convention 2015)  
Blaine County School District Common Core community outreach panelist, fall 2013  
Idaho Education Excellence Task Force Member, Idaho Education Association – responsible for educational reform research, Sept. – Dec. 2012  
English Department Chairman, Wood River High School, 2012-14  
Fellow: Idaho Humanities Council Teacher Institute “Visionary Landscapes: Willa Cather and the Search for Place in the West,” College of Idaho, Caldwell, July 2012.  
Content Area Specialist: Idaho Curricular Materials Review Committee, 2007-current.  
Participant: Item Analysis and Sensitivity Review (for ISAT), Data Recognition Corporation, Boise, Idaho, Oct. 2011.  
Participant: International Baccalaureate – MYP Training, Los Angeles, Nov. 2010.  
Participant: National Council of Teachers of English Annual Convention, 2008, San Antonio; 2009, Philadelphia; 2011, Chicago; 2012 Las Vegas, 2013 Boston  
Fellowship: National Humanities Center “Making the Revolution: America, 1763-1789,” summer institute for high school teachers, June-July 2008.  
Participant: Summer Advisers Institute, Journalism Education Association, Kansas State University, Kansas, July 2006.  
Participant: Oregon Journalism Education Association Summer Adviser Workshops, Oregon State University, Corvallis, July 2005.  
Fellow: Idaho Humanities Council Teacher Institute “Nothing But the Truth: Survival and Celebration in Native American Literature,” Albertson College, Caldwell, July 2005.  
Presenter: “Partnering Business Professionals: Student Writing in the Real World” and “Teaching Punctuation: We Can’t Live With It; We Can’t Live Without It.” National Council of Teachers of English Annual Convention, San Francisco, November 2003.  
Participant: American Society of Newspaper Editors Summer Institute for Teachers, University of South Florida, Tampa, July 2003.  
Presenter /Trainer: “Motivating At-Risk High School Students,” a 2-day workshop for Upward Bound teachers, University of Idaho, Moscow, June 2002.  
Teacher-in-Residence, Idaho State University, College of Education, Pocatello, 2001-02.  
Student-Intern Supervisor, Idaho State University, 2001-02.  
Participant: National Council of Teachers of English Annual Convention, Baltimore, 2001.  
Presenter/participant: International Ezra Pound Conference, Paris, July 2001.  
Idaho Professional Standards Commission, 1995-2001.  
University of Idaho Supervisor, English 401: Writing Workshop for Teachers.  
Assisting alternate route candidate Mary Mozes, Butte High School, Arco, Idaho, 2000-01.  
Fellow: Idaho Humanities Council Summer Institute for Teachers  
“Tough Paradise—The Literature of Idaho and the Intermountain West,” July 2000.  
Member of Board of Directors, Ezra Pound Association, Hailey, ID, 1999-2002.  
Blaine County Education Association Building Representative, 1997-1999, 2003-05.  
Idaho Education Association Delegate, 1984, 1997, 1999, 2010, 2012.

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District Language Arts Curriculum Committee, 1996-current.  
Graduate Study New York University: "Film Study for the High School Teacher," Summer 1995.  
Participant: 1994 National Council of Teachers of English Annual Convention, Orlando.  
Guest/Chaperone: U.S. Space Academy II, Huntsville, Alabama, October 1992.  
Trustee of Hailey Library Board, 1991-92.  
Presenter 1992 March District In-service: "Taxidermy and English."  
Mentor Teacher, Spring 1990-91: Assisting first year teacher Stephanie Saunders, Wood River High School, in the Blaine County School District "Mentor Program."  
Mentor Teacher, Spring 1990: Assisted first year English teacher John DePasquale, Carey High School, in the Blaine County School District No. 61 "Mentor Program."  
Presenter, "Motivating Materials and Methods for Upward Bound Students," Northwest Association of Special Programs Fall Conference, Portland, Oregon, December 1989.  
Blaine County Education Association Building Negotiator, 1988.  
Treasurer, 1988-1992, Blaine County Education Association, Hailey, Idaho.  
Area Host and Facilitator, Idaho Council of Teachers of English, 1985 Fall Conference, Hailey.  
English Department Chairman, 1983-1990, Wood River Junior High School, Hailey, Idaho.  
Presenter: "Basic Skills in a Rural Setting," National Council of Teachers of English Annual Convention, 1981, Boston, Massachusetts.  
TRIO Training (Special Programs for Disadvantaged Students):  
National Council of Educational Opportunity Associations "Computer Training," Coeur D'Alene, Idaho, April 1984.  
Marquette University "Curricula Design Institute," Atlanta, March 1981.  
University of Colorado-Boulder "National Center for Counseling and Instruction," Denver, February 1980.

**Special Skills**

Basic Educational Technology Competency Certification, Boise State University: word processing, spreadsheets, database, telecommunications, presentation software and integration.  
Desktop publishing: electronic page design and Photoshop.

**Memberships**

Blaine County Education Association  
Idaho Education Association  
National Council of Teachers of English

**References** Available upon request.

## D. Laree Jansen

3669 North 3200 East  
Kimberly, ID 83341-5344  
208-733-1168

**Objective:** Retain a position as Parent Representative on the Idaho State Board of Education Curriculum Selection Committee

### **Current Occupation:**

Tutor for high school and college math students  
Small business owner  
Retired educator  
Parent of five children who are successful products of public education

### **Full-time, Certified Work Experience:**

Math specialist and paraprofessional in Wings Charter Middle School, Twin Falls, ID  
Math teacher in Twin Falls (Idaho) School District.  
Math teacher in Kimberly (Idaho) School District  
Math teacher in Box Elder County and Roy, Utah, School Districts  
Teacher in Grandview, WA

### **Other teaching experience:**

Substitute Teacher in Twin Falls and Bonneville School District in Idaho  
Substitute Teacher in Burns, Hines, and Burns Union High School Districts in Oregon

### **Owner, manager of own business:**

Tupperware Products sales person; successful business operator since 1979

### **Volunteer Experience:**

Idaho State Math Curriculum Standards Writing Committee  
Idaho State Math Textbook Adoption Committee  
ISAT content Standard Question Writing Committee  
TFHS Extra Help Curriculum Committee Chair  
TFHS Building Leadership Team Member  
TFSD Contract Negotiations Committee Member

Teacher Organization Membership Recruiting Committee member and chair  
Teacher Organization Vice President  
TFHS Industrial Engineering and Natural Resources Small Learning

**Community Chair**

TFSD Professional Leave Committee Member and Chair  
4-H Leader in livestock and FCS 4-H club  
Community Quilters of Twin Falls (make and donate quilts to local charities)  
Executive and teaching positions in my church young children's group, youth group, and adult women's group as well as other executive and service positions within the church

**Education:**

Washington State University, Pullman, WA  
Utah State University, Logan, UT; BS in Math Education  
BYU, ISU, NNU, U of I, BSU, CSI more than 95 additional credits in math, child development, technology, curriculum studies, and education related courses.

**Awards:**

Distinguished 4-H Leader award for Twin Falls County  
Additional recognition and 4-H awards  
Distinguished sales person of the month several times in Tupperware  
Manager of a sales unit consistently in the top five units of the Tupperware distributorship in Idaho Falls

**References:**

Mr. Stacey Behrens, 534 Whispering Pine Drive, Twin Falls, ID 83301; 208-733-5135  
Mrs. Kenna Arrington, 3023 A East 3400 North, Twin Falls, ID 83301; 208-733-0612  
Mr. Todd Harris, 3160 East 3600 North, Twin Falls, ID 83301; 208-736-2975

## Stacey Jensen

### CURRICULUM VITAE

14504 W. Wallin Rd  
Pocatello, ID 83202  
Email: jensenst@sd25.us

#### Education

1985	HS Graduate High Honors	Highland High, Pocatello, ID
1985-1988	B.S. Elementary Education	Idaho State University, Pocatello, ID
1990-1995	MA Curriculum and Instruction	Idaho State University, Pocatello, ID
2000	National Board certification in Early Childhood Education	

#### Prior Employment

1988-present Teacher at Edahow Elementary School  
7 years in Kindergarten  
7 years in 1st Grade  
9 Years in 2nd Grade  
Presently in 1st Grade

#### Awards/Honors

2005 Edahow Elementary Teacher of the Year  
2006 Pocatello/Chubbuck Teacher of the Year  
2007 Disney Teacher of the Year Nominee  
2008 Simplot Teacher of the Year Finalist  
2013 Simplot Teacher of the Year Finalist

#### Committees

I have served on several different committees at the school, district and state level throughout the years. I have served on my school's leadership team since it's inception in 1998. I have also served on various sub committees including technology committee, report card committee, Infinite Campus committee, Sunshine committee, PTA teacher representative, and health and wellness committee.

I have also served on various committees with my district throughout the years. I have served on curriculum committees to adopt science, reading, math, and social studies. I served on the committee to create the district writing/spelling guideline handbook. I served on the district leadership committee for 1 term. I served on the district's TiA committee which worked to match Idaho State standards to district curriculum and created learning calendars as guidelines for teachers to follow. I also served on the district's assessment committee which worked to create formative assessments for each 6 week period. With the adoption of Common Core State Standards and Idaho Core Standards, I serve on the district's Unit Development team which creates units for each grade level which match curricula and Core Standards. This team each year has worked to refine the units, create formative and summative assessments aligned to the standards. The team works extensively during the summer and then throughout the school provides support to teachers as they implement the units. I was asked to be a Mathematical Instructional Coach for my school starting in the 2014 school year and continue on with that role during the 2015 year. In addition I was asked to be the Instructional Writing coach for my building as well. Both of these positions require intense coursework involving Instructional Coaching skills as well as in depth instruction regarding how Common Core has affected Mathematical and Writing instruction. These positions allow me the opportunity to work with the other teachers in my building on constant improvement. While working with them I find my instructional practices improving as well.

At the state level I worked on several standard setting committees as state standards and power standards were being developed. I worked specifically on math and science committees. More recently, I worked on a committee to revise the state math standards prior to the adoption of Common Core standards. I was a scorer for the 4th grade DMA in recent years. I have also worked with the PSC's committee for teacher accreditation for the past 11 years and have been involved one way or another with accrediting the teacher Education programs of all of the state colleges and I believe have chaired a review for each of these with the exception of ISU which I am co-chairing in the Fall of 2015. In addition, I

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have worked with this committee to help develop and revise the accreditation and beginning teacher standards and the accreditation manual.

I have been on the PSC's Curriculum Selection committee for 2 appointments now and I still feel that this is one of the best professional development activities I have ever had. Each year I renew and deepen my knowledge of the standards, curricula, assessment, and teaching. This is an amazing opportunity to now only learn about my first grade standards but standards from ALL subjects K-12. It is so amazing to see what types of opportunities my first graders will have in the future! I would be honored to serve another term on this committee.

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July 2, 2015

Dear Kathy,

As of tomorrow, I will be a resident of Las Vegas, NV. I will no longer be able to serve the Idaho SBOE as a standing member of the Curricular Materials committee. Thank you to the SBOE for the opportunity to serve in this capacity. I have learned so much about the selection process and recognizing quality materials.

Good luck to all. I will miss serving on the committee.

Tara L. Drexler, M.Ed.  
6th/7th Social Studies  
RSMS  
TFSD #411

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