

REQUEST FOR PROPOSAL (RFP) - TERMS

General Terms (if applicable)

SERVICE PROVIDER AGREES WITH STATEMENT(S)- must initial & include THIS PAGE with bid/proposal

**AGREE
(by initials)**

1 Complies with USAC Competitive Bid Rules & Regulations

- a. To receive E-Rate discounts, School districts will comply with fair and competitive bid process, either by state procedurement laws or rules of Universal Service Administration Company (USAC)- Schools and Libraries Division.

2 Erate Projects may be contingent on Erate funding approval

- a. All requested products and services may be contingent upon Erate funding approval and /or school board approval.

3 Service Providers must be compliant with all terms of USAC and provide SPIN#

- a. Service Providers must meet all terms and conditions by Universal Service Administration Company (USAC)- Schools and Libraries Division Erate program and must provide SPIN# (Service Provider Identification Number) on bid/proposal response.
- b. All service providers agree to participate and comply with any additional information needed and/or audits after the bid process. Based on USAC rules, apply to all winning or losing bids and up to 10 years from the last date of service.

4 Bids and Proposals; must be compatitible, may offer multiple solutions or options by separate proposals

- a. Service Providers may offer product options (i.e. different product models or manufacturers and/or different lengths of cables); *for each recommended technology solution, a separate bid proposal is required.*
- b. The technology solution proposed must be must be operational and compatible with all network equipment brands/software used by school district, without any additional equipment or cost to make the solution compatible.
- c. No refurbished equipment is accepted unless otherwise stated. Equipment must be commercial or enterprise models, no retail models accepted.

5 School district reserves rights within the competitive bid process

- a. School District reserves the right to accept all, some or none of the received bids.
- b. School District may award bids or proposal by per product, per project or entire bid basis.
- c. School district considers all bids as CONTIGENT ON ERATE FUNDING APPROVAL; unless otherwise notified. The school district will be responsible for products and services ordered and not funded by USAC.
- d. School District is seeking the Lowest Corresponding Price (LCP) or best bid available for school and or student needs; per USAC terms and conditions.
- e. The school reserves the right to interview or ask additional questions to service provider candidate as part of the bid evaluation process.
- f. Bid evaluations will be scored primarily on proposal price and other evaluation factors.

Evaluation and/or Disqualifying factors may include but not limited to:

- 1** DISQUALIFICATION FACTOR: Bids/Proposals received later than posted deadline; may be subject to disqualification.
- 2** DISQUALIFICATION FACTOR: Bids/Proposals must meet requested minimum requirements as listed; incomplete bids may be subject to disqualification.
- 3** DISQUALIFICATION FACTOR: If a site visit is REQUIRED; and service provider does not attended; the received bid may be subject to disqualification.
- 4** EVALUATION FACTOR: Bid evaluations will be scored primarily on proposal price. BID PROPOSAL MUST USE CORRECT MATHEMATICS (addition, subtraction or percentages off) TO VERIFY THE CORRECT BID TOTAL, incorrect math may result a evaluation factor to determine winning bid.
- 5** EVALUATION FACTOR: Service provider must allow the school district with the ability of preferred discount method, may be a evaluation factor.
- 6** EVALUATION FACTOR: For INTERNAL CONNECTIONS - Bids/Proposals must provide required manufacturer, model# and manufacturer part numbers, qty, unit price and extended pricing.
- 7** EVALUATION FACTOR: For BASIC MAINTENANCE SERVICES - Bids/Proposals must provide detailed scope of services, estimates of time or schedule of maintenance, and list of eligible equipment, divided by site location (entity location). Location from service provider may be a factor in evaluation.
- a. For most eligible services such as Installation, Basic Maintenance, Managed Internal Broadband Services, etc. - Service Providers recommended to be within 100 mile radius (approx. 1-2 hours) from school district location.
- b. If using sub-contractors, required disclosure of the contracting company and company information, including bonded, insured and with state specific requirements for any restrictions to personnel.

6 RFP may include not eligible items, if noted

This RFP may include not eligible items (for bid only) for school construction project or special technology project, required for job but not specific for Erate discount request and should be identified as **NOT ELIGIBLE**.

7 Able to exercise competitive pricing options via state contract or consortium member pricing

School district may allow State Contracts or other consortium membership pricing to receive bid prices. Service Provider quoting state contract pricing must include a copy of the State Contract as part of their bid response.

8 No cancellation penalties or change order charges

Bids/proposals, contract/agreements may not contain liquidated damages or cancellation charges. Such charges are considered not eligible for Erate discounts.

School district reserves the right to change order, via USAC service substitution or reduce their E-rate order without penalties.



This page is REQUIRED APPENDIX (A) for submitted bid or proposal

DATE: _____
SALES REPRESENTATIVE NAME: _____
SERVICE PROVIDER NAME: _____
SPIN# _____

REQUEST FOR PROPOSAL (RFP)
School District Specific - Additional Information

1 Request for proposal (RFP) will be public posted & communicated by the school (USAC minimum requirement 28 days)

- USAC Website
- School Website
- Local Newspaper
- Next School Board meeting
- School Public Bulletin Board
- School social media communication (facebook, twitter, etc)

2 For any questions or concerns about this RFP:

- a. Service provider MUST submit questions to school by email.
- b. Answers will be posted & maintained on school website for all available bidders to review before submitting a proposal (updated weekly as a minimum).
- c. **SEE SCHOOL WEBSITE or PAGE:**

www.simonjudeschool.org

3 a. **Required Bidder's Conference or Site Visit:**

- Applies to this RFP
- Does not apply for this RFP

b. **Type of Site Visit**

- **ONSITE VISITS** may be recommended unless otherwise noted as required action. Site visit attendance will be documented and may be a factor in the bid evaluation results.

- REQUIRED SITE VISIT (MAY BE SUBJECT TO DISQUALIFICATION WITHOUT); SPECIFICALLY REQUIRED FOR MEASURING CABLING AND INSTALL PROJECTS
- RECOMMENDED SITE VISIT (MAY BE SUBJECT TO BID EVALUATION POINTS)
- NO SITE VISIT IS NEEDED FOR THE TYPE OF REQUEST(S) EXPECTED - PER SCHOOL CONTACT

- c. Only if site visit is scheduled, request to register INTEND TO BID PAGE will be a bid requirement
- d. **SITE VISIT LOCATION: Potential bidders - please contact for appointment**

SS Simon & Jude Cathedral Sch 6351 N 27th Ave Phoenix, AZ 85017

e. **SITE VISIT**

- SCHEDULED BY APPOINTMENT
- SCHEDULED BY GROUP

GROUP VISIT #1:

n/a

GROUP VISIT #2:

n/a

- f. Onsite visits are highly recommended for such projects that include but not limited to cabling, installation, basic maintenance or managed internal broadband services.
- g. Plan to schedule group visits to ensure all service providers are offered the same time to ask questions, take measurements, or make note of any barriers to services offered. Group site visits allow for additional communication as well as limited interruptions to school campus and student activities.
- h. Two (2) dates and times will be available for groups to meet within the "bid window", from posting date to deadline date. (also meeting the USAC required 28-day minimum)
- i. School may authorize a site visit by appointment after group visits. In order to maintain a fair and competitive bid, only the information given at the group meeting would be able to be discussed, any additional questions or concerns - need to be submitted in writing for public website reply.

REQUEST FOR PROPOSAL (RFP)

Bid Proposal Documentation Requirements

A BEFORE BID PROCESS - INTEND TO BID PAGE (see attached page)

- 1 ONLY IF SITE VISIT IS REQUESTED OR REQUIRED
- 2 To schedule appointment with school site visit - COMPLETED & SUBMIT TO SCHOOL CONTACT
- 3 **ALL SERVICE PROVIDERS MUST SIGN ERATE ONSITE VISIT LOG AT TIME OF CAMPUS VISIT!!**

B Response bid/proposal MUST INCLUDE:

- 1 USAC Service Provider SPIN #
- 2 Company information: including a brief company background and experience.
 - a. Contact Information (may include sales, service, Erate and Accounting with phone numbers and emails.
 - b. Subcontracting company information, if applicable must be disclosed at time of bid.
 - c. Federal Tax ID certificate (w-9)
- 3 **FOR INSTALLATION OR ON-SITE SERVICES ONLY:** A copy of certificate of insurance. Please note the school district may request a current copy certificate of insurance (depending on expiration of policies) before any work or services to be completed on campus locations. (and subcontractor, if applicable)
 - a. Bids/proposals complete copy of contract with terms or legally binding contract with pricing for all products and services to review for consideration.
 - b. A copy of any formal contract with terms and/or legally binding contract to review for consideration.
 - c. Service providers may use their own proposal format. Provided worksheets are not required;
 - d. Separate bids for offering different makes, models or options.
 - e. Each proposal must have complete detailed pricing and/or Statement of Work; complete details of services including maintenance and warranty information. (if any)
 - f. Copy of State contract, consortium or cooperatives pricing, if applicable.
 - g. Confirm preference of Erate discount requested.
- 4 List of References with same scope of work. (minimum of 3 within the state)
- 5 ATTACHMENTS BY APPENDIX
 - a. **GENERAL TERMS PAGE-with service provider acknowledgements; COMPLETED**
 - b. COPY OF ANSWERED RFP QUESTIONS POSTED ON SCHOOL WEBSITE: print copy of the posted questions and answers from school website [*with as of*] date and signature. If no questions were received, just sign and date "website blank copy"

C Instructions to submit

- 1 Bids will be accepted for a minimum of 30 calendar days. (USAC requires 28 calendar days)
- 2 Submit bids/proposals to SCHOOL CONTACT by email and/or mail
 - a. ***Email copy of proposal to consultant for reference and any future audit purposes only. School makes final evaluation decision for winning bid.***
- 3 **DEADLINE FOR BIDS:** Bids must be received no later than the deadline date unless an extension is public posted (FORM 470 update) or Cardinal Change requiring a new FORM 470.
- 4 EVALUATION FACTOR: did the proposal meet all the information as requested?
 - a. Is the proposal complete and understand scope of work?
 - b. Does equipment include manufacturer part numbers? Descriptions? And Price per unit?
 - c. Does the bid MATH calculate the total amount as stated?
 - d. Does the proposal require any clarifications?

INTENT TO BID & SUBMIT RFP QUESTIONS

SERVICE PROVIDERS Immediately Complete & submit THIS PAGE

*****THIS FORM IS REQUIRED - ONLY IF SITE VISIT IS SCHEDULED*****

DATE _____

SERVICE PROVIDER: _____

CONTACT: _____

EMAIL: _____

OFFICE# or CELL#: _____

SITE VISIT LOCATION: Potential bidders must attend at least 1 scheduled meeting

SITE VISIT?	YES, RECOMMENDED		PLAN TO ATTEND?
VISIT DATE/TIME #1			
VISIT DATE/TIME #2			
meet at address:	SS Simon & Jude Cathedral Sch 6351 N 27th Ave Phoneix, AZ 85017		
FOR SITE VISIT -- ALL SERVICE PROVIDERS MUST SIGN ERATE PRE-BID MEETING LOG!!			

Please note any school closings or breaks BEFORE bids are due.

CLOSED HOURS:	n/a
THANKSGIVING*	<u>11/20/2023 - 11/24/2023</u>
CHRISTMAS*	<u>12/20/2023 - 1/4/2024</u>
WINTER/SPRING BREAK	<u>3/29/2024 - 4/7/2024</u>

* Due to school breaks, school contact may have limited access to email.

BID DEADLINE	3/5/2024 *
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NOTICE TO POTENTIAL BIDDERS

A Our intent is to provide a fair and open bid process.

Submit questions no later than **2/29/2024***
 to lstoutenburg@simonjude.org
 SS Simon & Jude Cathedral Sch
 Lisa Stountenburg

B All questions and answers will be posted by **2/29/2024***
 *or last school business day before weekend, school break or holiday

C For RFP updates, questions and answers– not through individual emails.
SEE SCHOOL WEB SITE PAGE: **www.simonjudeschool.org**

D We are not responsible for any missed electronic delivery/riecept of any emails or correspondence.

REQUEST FOR PROPOSAL (RFP)

Category One

READ ALL INSTRUCTIONS:

THIS SECTION FOR CAT1:

- Applies to this RFP
- Does not apply for this RFP

1 All bids submitted for requested products/services must **meet or exceed:**
SEE (a) General RFP Terms, (b) Category Terms and/or (c) School Specific information terms.

- 2 Preferred Discount Method for CATEGORY ONE
- SPI - Service Provider Invoice Credit
- BEAR - Billed Entity Applicant Reimbursement
- No Preference

3 **INTERNET ACCESS & TELECOMMUNICATION:** Products / services must comply with annual USAC Eligible Services List. (ESL)
 All charges (or costs) MUST BE disclosed, defined and listed separately.

INTERNET ACCESS	Defined as provided bandwidth service for eligible locations to the Internet
TELECOMMUNICATION	Services for transport - point to point or WAN, to connect multiple points, services used to connect eligible locations to the Internet.

4 USAC application requirements, may require more extensive details. Proposals may provide additional details, diagrams, etc.

a. **FOR SPECIAL CONSTRUCTION CHARGES - USAC requires additional worksheet of information!**

5 PRICING AND COSTS

a. Monthly recurring charges CAN NOT INCLUDE any other charges.

1 Services Contract Pricing may vary by terms or length of time. Service Providers may place multiple bids for options or one bid with multiple options for consideration, unless an details are specifically requested.

2 **Copy of the contract or agreement will be required, purchasing terms must be specific and eligible for E-Rate funding year.**

b. All OTHER CHARGES (sales tax & surcharges, special construction, installation, maintenance, etc.) must be listed separately.

1 **Must include ALL direct and indirect costs including** miscellaneous charges (as listed on ESL) for consideration: include any change fees, contingency fees, freight assurance fees/shipping, lease or rental fees, per diems or travel time, taxes, surcharges and other reasonable charges including but not limited to: installation, activation and initial configuration fees; design and engineering, project management costs, and/or on-site training. All charges must be identified for erate eligibility.

d. ERATE ELIGIBLE DISCOUNTS for Proposals may offer other service options including but not limited to: leased router & other required equipment (for CAT1 on-premise use) for consideration. *Requires same service provider for equipment & CAT1 services!*

e. OTHER SERVICES NOT ELIGIBLE FOR DISCOUNTS - Proposals may offer other service options including but not limited to: internet filtering, email, website services, or other technology solutions for improved network performance; any option not listed on the Eligible Services List (ESL),FORM 470 or RFP

f. Not eligible charges or cost allocations for any products or services must be identified or noted at the time of the bid. (for bid evaluation & funding request purposes)

g. The school district will be responsible for products and services ordered and not funded by USAC.

6 QUALITY OF SERVICE

a. Service provider must explain and detail quality of service provided:

1 Service performance define details for Network Availability %, average # of minutes/hours of out of service

2 Describe in detail response times and services resolutions

3 Provide copy of Service Level Agreement document, with contract copy if available or required

7 Service requests are estimates (qtys or capacity is more or less) and may fluctuate over life of the contract term.

a. All Internet Access & Telecommunication Services (WAN, PTP, etc.) must be (1) dedicated symmetric bandwidth, bid/proposal must include bandwidth descriptions with increment pricing

b. A proposal or final contract must include the ability (1) to increase bandwidth or (2) add services to new school sites/locations (ENTITY) throughout the contract term by addendum, without the requirement new bid process.

c. Quantities listed on RFP are based on estimates more or less (MOL) and can be adjusted at FORM 471 application per service provider recommendation or PIA review as needed to reduce funding requests.

8 School District will accept questions VIA EMAIL about services seeking Erate discounts. Please see contact page 1 for information.

REQUEST FOR PROPOSAL (RFP)

Category One

Proposals are not required to use this form worksheet; however, any proposals submitted must include all the required information listed!!!

SERVICE PROVIDER MAY SUBMIT MULTIPLE BIDS, TO PROVIDE ALL AVAILABLE OPTIONS FOR CONSIDERATION: VARIES SERVICE OPTIONS, INSTALLATION CHARGES, SPECIAL CONSTRUCTION, ETC

INTERNET ACCESS

Defined as provided bandwidth service for eligible locations to the Internet

Services Contract Pricing & Terms may vary by length of time. (proposal for ALL available options, if nothing is specifically selected)

- | | |
|--|---|
| | (i) Service agreement, one year term [12 months] |
| | (ii) Service agreement, one year term [12 months] with extensions options up to 5 years |
| | (iii) Service agreement, Multi-year term (up to 3 or 5 years in length) |
| | (iv) Special Construction costs (analysis for cost worksheet) |

0%	= Estimated discount	
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QTY (MOL)	SERVICES FOR BID	DETAILS (must meet or exceed)	DISTRICT WIDE SERVICES	LOCATION (DMARC ADDRESS)	PRICE (per unit)	TAXES / SURCHARGES	REQUEST FOR LEASED ROUTER? <small>(If yes, then is there additional charge or included in monthly charges?)</small>	INSTALLATION?	SITE VISIT?	BASIC MAINTENANCE? <small>(if not included)</small>
	NOT ELIGIBLE SERVICES (if any)							SPECIAL CONSTRUCTION CHARGES? <small>(additional data worksheet will be required)</small>		

REQUEST FOR PROPOSAL (RFP)

Category One

Proposals are not required to use this form worksheet; however, any proposals submitted must include all the required information listed!!!

SERVICE PROVIDER MAY SUBMIT MULTIPLE BIDS, TO PROVIDE ALL AVAILABLE OPTIONS FOR CONSIDERATION: VARIES SERVICE OPTIONS, INSTALLATION CHARGES, SPECIAL CONSTRUCTION, ETC

TELECOMMUNICATIONS SVCS (data transmission)

Defined as services for transport - point to point or WAN, to connect multiple points, services used to connect eligible locations to the Internet.

Services Contract Pricing & Terms may vary by length of time. (proposal for ALL available options, if nothing is specifically selected)

- | | |
|--|---|
| | (i) Service agreement, one year term [12 months] |
| | (ii) Service agreement, one year term [12 months] with extensions options up to 5 years |
| | (iii) Service agreement, Multi-year term (up to 3 or 5 years in length) |
| | (iv) Services for Multi-year long term (for WAN services) |
| | (v) Special Construction costs (analysis for cost worksheet) |
| | (vi) CAT1 on premise equipment - same service provider |

0% = Estimated discount

QTY (MOL)	SERVICES FOR BID	DETAILS (must meet or exceed)	DISTRICT WIDE SERVICES	LOCATION (DMARC ADDRESS)	PRICE (per unit)	TAXES / SURCHARGES		INSTALLATION?	SITE VISIT?	BASIC MAINTENANCE? (if not included)
	NOT ELIGIBLE SERVICES (if any)							SPECIAL CONSTRUCTION CHARGES? (additional data worksheet will be required)		

REQUEST FOR PROPOSAL (RFP)
Category Two

Proposals are not required to use this form worksheet; however, any proposals submitted must include all the required information listed!!!

SERVICE PROVIDER MAY SUBMIT MULTIPLE BIDS, TO PROVIDE ALL AVAILABLE OPTIONS FOR CONSIDERATION: VARIES SERVICE OPTIONS, INSTALLATION CHARGES, SPECIAL CONSTRUCTION, ETC

INTERNAL CONNECTIONS (HARDWARE)

Defined as Network hardware and software (eligible for discounts by ESL)

60% = Estimated discount

<u>QTY (MOL)</u>	<u>SERVICES FOR BID</u>	<u>DESCRIPTION (manufacturer as listed or equivalent)</u>	<u>DISTRICT WIDE SERVICES</u>	<u>LOCATION</u>	<u>PRICE (per unit)</u>	<u>TAXES (or other charges)</u>	<u>TOTAL PRICE</u>	<u>COST ALLOCATION (NOT ELIGIBLE COSTS)</u>	<u>SITE VISIT</u>	<u>INSTALLATION / CONFIGURATION?</u>	<u>IS LICENSING REQUIRED FOR THIS PRODUCT? LIST ALL OPTIONS AVAILABLE.</u>
1	FIREWALL	Cisco Meraki Cloud Managed - Security Appliance; 1 x USB - Type A, 2 x 10Gb Ethernet - SFP+ (WAN), 8 x - SFP (mini-GBIC), 8 x 1000Base-T - RJ-45, 8 x 10Gb Ethernet - SFP+; cellular failover (PART# MX450-HW or equivalent)	YES	SS SIMON & JUDE CATHEDRAL SCH 6351 N 27TH AVE PHOENIX, AZ 85017					YES	YES, OPTIONAL	YES, SEE BELOW (OPTIONS)
1	FIREWALL LICENSE	License for Cisco Meraki MX450 options available for 1 year, 3 year, 5 year, 7 year									YES, TERMS: 1 YR; 3 YR; 5YR; 7YR
37	WIRELESS ACCESS POINTS	Cisco Meraki - wireless access point - Wi-Fi 6E - cloud-managed; 802.11a/b/g/n/ac Wave 2/ax (Wi-Fi 6E); 1 x USB 2.0 - Type A, 2 x 1/2.5/5GBase-T (PoE+) - RJ-45 (PART# MR57-HW or equivalent)	YES	SS SIMON & JUDE CATHEDRAL SCH 6351 N 27TH AVE PHOENIX, AZ 85017					YES	YES, OPTIONAL	YES, SEE BELOW (OPTIONS)
37	WIRELESS ACCESS POINT LICENSES	License for Cisco Wireless Access Points options available for 1 year, 3 year, 5 year									YES, TERMS: 1 YR; 3 YR; 5YR
											Multi-year license agreement? (INCLUDE ALL OPTIONS)

REQUEST FOR PROPOSAL (RFP)
Category Two

Proposals are not required to use this form worksheet; however, any proposals submitted must include all the required information listed!!!

SERVICE PROVIDER MAY SUBMIT MULTIPLE BIDS, TO PROVIDE ALL AVAILABLE OPTIONS FOR CONSIDERATION: VARIES SERVICE OPTIONS, INSTALLATION CHARGES, SPECIAL CONSTRUCTION, ETC

MANAGED INTERNAL BROADBAND SERVICES

Defined as Services provided by a third party for the operation, management, and monitoring of eligible broadband internal connections are eligible managed internal broadband services (e.g., managed Wi-Fi).

Services Contract Pricing & Terms may vary by length of time. (proposal for ALL available options, if nothing is specifically selected)

X	(i) Licensing term(s) and/or cloud based licensing
X	(ii) MANUFACTURER MAINTENANCE AGREEMENT BY PART NUMBER
	(iii) Service agreement, one year term [12 months]
	(iv) Service agreement, one year term [12 months] with extensions options up to 5 years
	(v) Service agreement, Multi-year term (up to 3 or 5 years in length)

60% = Estimated discount

<u>QTY</u> <u>(MOL)</u>	<u>SERVICES FOR BID</u>	<u>DESCRIPTION</u> <u>(manufacturer as listed or equivalent)</u>	<u>DISTRICT</u> <u>WIDE</u> <u>SERVICES</u>	<u>LOCATION</u>	<u>PRICE (per unit)</u>	<u>SITE VISIT</u>
1	FIREWALL LICENSE	FOR Cisco Meraki MX450 License options available for 1 year, 3 year, 5 year, 7 year (If applicable, SAME AS INTERNAL CONNECTIONS)	YES	SS SIMON & JUDE CATHEDRAL SCH 6351 N 27TH AVE PHONEIX, AZ 85017		YES
37	WIRELESS ACCESS POINTS LICENSE	FOR Cisco Wireless Access Points License options available for 1 year, 3 year, 5 year (If applicable, SAME AS INTERNAL CONNECTIONS)	YES	SS SIMON & JUDE CATHEDRAL SCH 6351 N 27TH AVE PHONEIX, AZ 85017		YES