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NOTICE TO SERVICE PROVIDERS (VENDORS) BIDDING FOR 2012-13 E-RATE REQUESTS FOR PROPOSAL

Kellogg & Sovereign[®] Consulting, LLC ("KSLLC") utilizes a custom, online, bidding program for E-rate. The online program allows our client schools and libraries to post their Requests for Proposal ("RFPs") in one location. Service providers may then post bids in the proper format online in response to the posted RFPs. There are no fees charged to service providers for use of the online bidding tool. Service providers must apply for access to the site to be assigned a login ID. Logins and passwords are necessary in order for the program to provide secure access only to authorized individuals to bids posted online.

A. BIDDING REQUIREMENTS

All service providers must have a SPIN (Service Provider Identification Number) assigned by the Schools & Libraries Division ("SLD") of the Universal Service Administrative Company ("USAC").

All service providers must also have a FCC registration number assigned by the Federal Communications Commission.

Bid on-line: www.erate470.com. We request that all service providers submit bids online. Once you have entered your bids online, you will need to print, sign and mail your signed bids to KSLLC. *If you provide signature authorization to KSLLC, you **will not** need to print and sign your bids as your signature will automatically be affixed to your bids.* Bidders may submit supporting details and schedules.

All documents submitted MUST include the following :

- service provider name
- contact name
- address, city, state, zip,
- phone and fax numbers
- email address
- service provider identification number (SPIN)
- school/library name
- location for installation of equipment, if applicable

Bids MUST include pricing detail by line item including:

- Quantity, Description, Manufacturer, Model Number or Product Name, Part Number or SKU, Location, Unit Price, Extended Price
- Cost Allocation - Eligible %
- Cost of Basic Maintenance, Installation, Configuration, Delivery, Travel and Per Diem charges must all be listed as separate line items for the associated product or service

Notice to E-Rate Service Providers (www.erate470.com)

- Bids for basic maintenance must list quantity, manufacturer, product name or model number, SKU or ID No. and location of all equipment to be maintained. Your bid MUST provide a separate price (line item pricing) for each item to be maintained. If servers are included, the bid must also specify the percent of eligible and ineligible uses of the server. If the bid includes Uninterruptible Power Supplies (UPS) you must also provide a listing of the equipment to be supported by the UPS.
- Maintenance bidders must also submit a scope of work (SOW).
- Bids for NEW servers must specify the percent of eligible and ineligible uses of the server.
- Bids for NEW Uninterruptible Power Supplies (UPS) must include list of equipment that will be supported by the UPS
- List ALL items in your bid INCLUDING ineligible items. You may provide general description on your online bid, and then send us a detailed spreadsheet. The detailed bid file name must include your company name and the school/library name. Your detailed bid must be sent by email to: forms@kelloggllc.com.
- Show ineligible items on a separate line item with a negative amount so it will be subtracted from your total bid. For examples, see: Step by Step Bidding Instructions
- DO NOT submit price lists online. You may list only one solution per bid. If you want the school/library to consider other options you have available, you may list in the description of your bid a link (URL) to your price lists posted on your website.

Bids MUST list maintenance, installation, configuration, delivery, travel and per diem charges, if applicable, as separate line items for the associated service.

Contracts must be submitted with bid – signed and dated. Bidders for all services and products (except for tariffed telecommunications services and month-to-month services that do not have a related contract) must also submit a contract for service and/or products.

Contracts can be automatically generated. When the applicants select the bids to include in their application, KSLLC's bidding program can generate a standard contract. If you have provided signature and logo authorization, your contracts can be automatically generated with your approved logo and signature. See: <http://www.kelloggllc.com/eratebid1.aspx>.

Custom Terms and Conditions. Service Providers who choose to utilize KSLLC's contract printing option may also provide a URL link to your standard terms and conditions to be included in the standard contract. *Please notify us by email: info@kelloggllc.com if you would like to add custom terms and conditions.*

Bids for Maintenance Services must include pricing per item. For Maintenance services, service providers are encouraged to use the on-line maintenance schedules submitted by the applicant to provide line item pricing for maintenance services on E-rate eligible equipment. The applicant-provided maintenance list can then be used by the bidder to assign prices, quantities, cost allocation, and make adjustments as needed to location, quantity, and description.

Notice to E-Rate Service Providers (www.erate470.com)

All proposals shall be subject to E-Rate funding and governing board approval.

B. DOCUMENT RETENTION REQUIREMENTS

All service providers participating in the E-rate filing process for KSLLC client schools and libraries agree to retain all documents necessary to demonstrate compliance with the statute and Commission rules regarding the school/library's applications for receipt of and delivery of services receiving schools and libraries discounts. Furthermore, if the applicant is audited pursuant to the services and products provided by the service provider, the service provider will make such records available to the Administrator. Records must be retained for a period of five years after the last date of service.

C. DISCLAIMER

The service provider and/or applicant is solely responsible for verifying the accuracy of information submitted to Kellogg & Sovereign® Consulting, LLC (KSLLC). KSLLC disclaims and makes no warranty, express or implied, nor assumes any legal liability or responsibility for the validity, accuracy, correctness, or completeness of any information that is provided by the service provider and/or applicant to KSLLC. By submitting bids for KSLLC client schools & libraries, the service provider agrees and understands that KSLLC will forward the information to USAC, and the service provider is responsible for verifying the accuracy of information submitted to KSLLC. Kellogg & Sovereign® Consulting, LLC shall not be liable for any direct, indirect, incidental, consequential or exemplary damages, including but not limited to, damages for loss of profits, data or other intangible losses (even if KSLLC has been advised of the possibility of such damages), resulting from the service provider's non-response or incomplete response and/or the service provider's inaccurate, invalid, incorrect, or incomplete provision of information.

D. ONLINE BIDDING INSTRUCTIONS

READ THE STEP BY STEP BIDDING GUIDE: <http://www.kelloggllc.com/eratebid4.aspx>

When you access the RFP site, you will need to login. If you did not bid last year, you will need to register for a new login ID and password. If you bid last year, but have forgotten your login and/or password, DO NOT set up a new login. Send an email to forms@kelloggllc.com and request your existing login & password or contact us using our online chat.

If you work with a company that has multiple individuals who are placing bids for the same company, contact us! KSLLC has the ability to set up a bidding group for the same company with an administrator who can see all bids placed for the same company group.

Follow the instructions on the screen to navigate the site. DO NOT USE THE BROWSER BACK AND FORWARD BUTTONS. Only use the program's buttons to navigate the site--this will ensure that all your bids are saved.

When you are on the RFP site, you will notice links on the services that further explain minimum specifications. Review general specifications: <http://www.kelloggllc.com/eratebid3.aspx>

Notice to E-Rate Service Providers (www.erate470.com)

If you have problems accessing the RFP site, or have any questions, please send an email to: forms@kelloggllc.com. We are also offering assistance via our online chat. Simply click on the "Live Support online" icon and you will be directed to someone in our office who can assist you.

Once you have logged in, you can view RFPs by Applicant. Once you have entered bids, the View RFPs by Applicant choice will include your bid information.

You can place bids for an individual applicant by using the "Place Bids by Applicant" choice.

You may place bids by service (using the same format as last year) by using "Place Bids by Service" option.

Blanket bids can be posted by using the "Place Blanket Bids" option. OUR OFFICE MUST REVIEW YOUR BLANKET BID PRIOR TO REPLICATING. Contact us for assistance!

Follow the instructions online to enter your bid details. If a line-item does not have an associated make/model number, enter a short description (i.e. "installation" "shipping charges").

Use the "Print Bids" option to print bids. YOU MUST PRINT AND SIGN your bids, then MAIL your bids to Kellogg & Sovereign Consulting, 1101 Stadium Drive, Ada, OK 74820 ***only*** if you have not provided a signature and logo authorization form.

Bids must be submitted online by 11:59pm CST on the RFP due date. NO late bids will be accepted.

E. APPLICANT-SPECIFIC RFPs

Applicants may direct service providers to detailed specifications or specific RFPs. The Applicant's RFP instructions override any instructions provided on our standard bidding site and online RFPs. For example, if the applicant has directed service providers to the RFPs posted on their site and they require delivery of three copies of the bids to the applicant's site by a certain date and time, then the service providers MUST follow the applicant's instructions or their bids will be disqualified.

Failure to read instructions posted on RFPs may result in disqualification.

F. RFP CHANGES

RFP Changes are listed on the bidding site. Once you have logged into www.erate.470.com, select the menu choice "RFP Changes." Review the list frequently!

G. SCHEDULED ON-SITE "WALK THROUGHS"

Some of the applicants REQUIRE bidders to attend on-site "walk throughs". The list of "Walk Through" dates is available on www.erate470.com.

Failure to attend a mandatory walk-through will result in disqualification.

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H. BID PACKET – PROVIDED TO APPLICANT

After the bidding period closes for the respective school or library, the school or library (applicant) will receive:

- bid selection worksheet that lists the various proposals entered on the RFP web site,
- bids that have been prepared on-line, printed and signed by service provider,
- detailed bids and supporting information submitted to KSLLC by the service provider PRIOR to the school or library's RFP closing date.
- Bid scoring grid for use in evaluating bids received

I. BID EVALUATION

Applicants will select the most cost-effective bids with price being the primary factor.

Each applicant may use different criteria which will be listed in the individual RFP for each applicant. If no bid selection criteria is specified in the RFP, the following criteria will be used:

Factor	Possible Points	Description
Price	30	Price of E-rate eligible products & services
Prior Experience	25	Prior experience with applicant and service provider's experience implementing successful installations in other school/libraries
Personnel Qualifications	20	Personnel qualifications. Certifications, number of years of experience.
Proximity	10	Proximity of service provider to school/library location
Quality of Service	10	Quality of product, availability and quality of repair and customer support services, warranty
Other costs	5	Costs for products and services needed for the solution that are not eligible for E-rate discount including costs to change providers.

In order for applicants to properly evaluate your bid, please provide details specific to the evaluation criteria areas along with your proposal.

When the applicant selects the bids they want to include on their E-Rate application, KSLLC will use our online bidding program to generate a bid number. For bids associated with a service provider who has provided KSLLC with authorization to print a contract, we will also use the program to print a signed and dated contract. Service providers may also include a link to their custom terms and conditions as part of the standard contract process.

J. BID AWARD NOTIFICATION

Each applicant will use their own methods for notifying service providers regarding award of E-rate bids.

USAC will send notification to all service providers whose bids are listed on a Form 471 once the Form 471 is submitted.

KSLLC will send copies of bids and contracts ("Item 21 attachments") to service providers upon request.

BASIC MAINTENANCE ADVISORY

The Sixth Report and Order stated that basic maintenance is only eligible if it is conducted on a break/fix basis or other actions required to prevent network failure. This means that you will need to provide incident reports for each visit to an applicant's site to perform necessary maintenance

USAC will not pay for maintenance up-front but rather pay for repairs conducted after you have identified that an item is damaged, is malfunctioning in some way, or fails. The company would then send a technician to the applicant site to repair, or replace the piece of equipment that had failed.

The following is a list of the information that should be reported for each incident where the provider is called to the applicant site to perform maintenance:

Service Incident Report:

Prepare a Service Incident Report immediately upon the completion of each maintenance service operation. Sign the report and obtain the signature of the person who requested the maintenance service to indicate that the work was completed satisfactorily. Leave a copy of the report with the person who requested the maintenance service. Each Service Incident Report should contain the following information:

- date and time the service request was received,
- date and time of Contractor's arrival at the service site,
- location of the equipment serviced,
- manufacturer, type, model and serial number(s) of each piece of equipment that was serviced or replaced,
- time spent performing the service,
- description of the cause of the malfunction,
- description of any repairs performed on parts or components that were not replaced,
- description of the cause of the malfunction, and
- the date and time that service was successfully completed.
- description of any part(s) or components that were replaced,
 - provide the following information regarding the replacement action
 - make, model and part number of the new equipment or cabling
 - make, model and part number of equipment being replace
 - method of disposition of damaged equipment or cabling
(Remember that you cannot dispose of any equipment for anything of value if it was purchased through E-rate)

Invoicing and Payment

Once the work is complete, the service provider should submit an invoice for payment

1. If SPI, an invoice for the applicants share
2. If BEAR, an invoice for the full amount for that incident

The applicant is expected to issue payment to the service provider for services rendered based on the reimbursement method used.

Record Keeping

Both the service provider and the applicant are required to maintain all records related to repairs accomplished including Purchase Orders, cancelled checks/warrants, and all documents created as a part of the service agreement for a period of 5 years following last date of service.

Additional information is contained in the Service Provider Study Guide for 2012-2013.