

NOTICE TO SERVICE PROVIDERS (VENDORS) BIDDING FOR 2018-19 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 ("applicants") to post their Requests for Proposal ("RFPs") in one location. Service providers ("bidders") 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

1. Service Provider Identification Number (SPIN).

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

2. FCC Registration Number.

All service providers must have a FCC registration number assigned by the Federal Communications Commission. The service provider must be in green light status.

3. OUSF-Oklahoma Service Providers. Service providers who are bidding for OUSF eligible services must be an eligible Incumbent Local Exchange Carrier, OneNet, or company that has a Certificate of Convenience and Necessity for the service area where the applicant is located. The awarded bidder must file for OUSF support within 90 days of the start of the OUSF-eligible service.

4. Bid Submission requirements.

4a. Submit bid online, www.erate470.com. Unless otherwise instructed by the individual applicant's RFP, service providers must submit bids through the online website, www.erate470.com.

4b. Signature Authorization provided - If the bidder has provided signature authorization to KSLLC, bids submitted online will be considered submitted. Signature authorization bidders do not need to print and sign the bids as the authorized signature and logo will automatically be affixed to the bids. Logos and signatures can be submitted online by the service provider. Authorization forms must be uploaded to www.erate470.com in order for your logo or signature to be valid.

4c. Signature Authorization NOT provided - If the bidder has not provided signature authorization to KSLLC, the bidder must print, sign and mail or email signed bids to KSLLC. Bids will be considered submitted timely only if signed bids are received by the due date and time.

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4d. Follow bid submission requirements as stated on each individual RFP. Bidders MUST follow all submission requirements as listed on the applicant's RFP. The bid submission instructions as listed on each RFP must be met in order for the bidder to be in full compliance with the applicant's bidding requirements.

4e. Item 21 Templates must be provided within 5 days upon request. The Item 21 templates will be required for most Category 2 bids that include over 10 line items. Templates are available on the USAC web site: <http://www.usac.org/sl/applicants/step03/form-471.aspx>

4f. Detailed bids and supporting documentation. Bidders may provide general description on the online bid, and then upload a detailed spreadsheet (see also required Item 21 template). The detailed bid file name must include your company name and the applicant name. The detailed bid and supporting documentation should be uploaded in the bidding screen on www.erate470.com.

All documents submitted MUST include the following:

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

5. BID DETAIL REQUIRED

5a. Vendor Qualifications

Vendor shall submit current certifications and qualifications demonstrating technical ability to install, test and maintain the proposed system and subsystems.

Vendor must be able to offer local support for the term of the contract.

Vendor will provide local references.

Vendor will identify all subcontractors to be used on the project.

5b. Bids MUST include pricing detail by line item including:

Quantity	Description	Manufacturer
Model Number	Part Number or SKU	Location
Unit Price	Extended Price	% Eligible

5c. Eligible % - Use the Eligible % column to break out the ineligible portion of a single line item. If the line item is fully ineligible, list the ineligible item on a separate line and 0% eligible. The eligible % is NOT the E-rate discount amount. The eligibility of a product is determined based on the components that are eligible for discount per the FCC Eligible Services List. Contact the manufacturer if you are uncertain of the product eligibility.

BE SURE TO CLEARLY MARK INELIGIBLE ITEMS AS 0% ELIGIBLE

5d. Associated Charges - The following charges associated with eligible products and services must be listed as separate line items on the same bid with the associated product or service:

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- Basic Maintenance (Bundled Warranty)
- Installation
- Configuration
- Shipping & Delivery
- Training
- Travel & Per Diem Charges

5e. Training Costs -Bids that include training costs must clearly define eligible training costs. On-site training is eligible as a part of installation services but only if it is basic instruction on the use of eligible equipment directly associated with equipment installation, and is part of the contract or agreement for the equipment. Training must occur coincidentally or within a reasonable time after installation.

5f. **Basic Maintenance**- Bids for basic maintenance must list:

- Quantity
- Manufacturer
- Model number or product number
- Part Number or SKU
- Location of each piece of equipment to be maintained
- Scope of Work (SOW)

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.

5g. Managed Internal Broadband Services (MIBS) - Bids for Managed Internal Broadband Services must include:

- complete list of equipment to be installed and/or managed including quantity, manufacturer, model number or product number, site location,
- whether or not equipment is owned by the applicant or the provider, and
- Scope of Work (SOW)

5h. Uninterruptible Power Supplies (UPS)- Bids for UPS equipment must include list of equipment that will be supported by the UPS, including make, model and part number.

5i. Ineligible Items. List ALL items for the complete project in your bid INCLUDING ineligible items. Ineligible items should be listed on a separate line as 0% eligible.

5j. PRICE LISTS PROHIBITED. DO NOT submit price lists online. You may list only one solution per bid. If you want the applicant to consider other options you have available, you may use the "optional item" check box to indicate optional items. You may also include in the description of your bid a link (URL) to your price lists posted on your website.

5k. Broadband Connections and Internet Access. Beginning with E-Rate FY2016, E-rate support is available for leased lit fiber, dark fiber, and self-provisioned broadband networks as described in the Second E-rate Modernization Order (FCC 14-189). Bids for broadband services must include as applicable:

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- Eligible monthly charges,
- special construction, installation and activation charges,
- modulating electronics and other equipment necessary to make a Category One broadband service functional (“Network Equipment”), and
- maintenance and operation charges.

Network Equipment and maintenance and operation costs for existing networks are eligible. All equipment and services, including maintenance and operation, must be competitively bid. Applicants that seek bids for special construction of dark fiber must also seek bids for lit fiber service; if self-provisioned network is sought applicants must also consider bids for third party networks, and fully consider all responsive bids.

Applicants may seek special construction funding for the upfront, non-recurring costs for the deployment of new or upgraded facilities. The eligible components of special construction are construction of network facilities, design and engineering, and project management.

Staff salaries and labor costs for personnel of the applicant or underlying beneficiary are not E-rate eligible.

Service providers whose bids include special construction charges MUST provide .jpg or .ksm file of the route; details of alternate routes considered including costs compared; cost detail of the proposed solution including bill of materials; cost per foot for aerial fiber, buried fiber and buried fiber in conduit; and full details of fiber strands installed and deployed. Additional information may be required to meet E-rate program, state and local requirements.

5l. Applicant non-discount portion of construction charges may be paid out up to four years with an installment plan between the applicant and the service provider. Service Providers who are bidding on services that have special construction charges should provide details on available installment plans with your bid response.

6.CONTRACTS

6a. Contracts must be submitted with bid – signed and dated. Bidders for all services and products (except for tariffed telecommunications services or month-to-month services which do not have a related contract) must also submit a contract for products or services.

6b. Contracts can be automatically generated. When the applicant selects the bids to include in their application, KSLLC's bidding program can generate a standard contract. If the bidder has provided signature and logo authorization to KSLLC, the program can automatically generate contracts with the bidder's approved logo and signature. See: <http://www.kelloggllc.com/eratebid1.aspx>

6c. Custom Terms and Conditions. Service Providers who choose to utilize KSLLC's contract printing option may also provide a URL link to the bidder's standard terms and conditions to be included in the standard contract. *Please notify KSLLC by email: forms@kelloggllc.com to add custom terms and conditions.*

6d. Conditional upon funding and subsequent governing board approval. Unless otherwise noted in the applicant's individual RFP, all proposals shall be subject to E-Rate funding and SUBSEQUENT governing board approval.

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6e. Extension to make contract term coincide with an E-rate Program Year or E-rate Extension.

Unless otherwise noted in the applicant's individual RFP, the applicant will reserve the right to extend or abbreviate the contract period if such extension or abbreviation is necessary to make the Contract term coincide with an E-rate "program year" or an extended service end date for an E-rate program year pursuant to a "service delivery deadline extension," as those terms are defined by the Federal Communications Commission ("FCC") and/or the Universal Service Administrative Company ("USAC").

B. DOCUMENT RETENTION REQUIREMENTS – TEN YEARS (effective 9/18/2014)

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 applicant'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 **ten 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 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>

ONLINE BIDDING ACCESS – www.erate470.com. Service providers will need to login to access the bidding site, www.erate470.com. New users will need to register for a login ID and password. Use the "reset password" link on the site to reset your password. If you have changed your email address or no longer have access to your account, DO NOT set up a new account. Send an email to forms@kelloggllc.com and request your existing login & password or contact KSLLC using online Live Chat or phone 580-332-1444 for assistance.

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SERVICE PROVIDER ADMIN - For service providers with multiple individuals who are placing bids for the same company, each salesperson is encouraged to have their own bidding account. KSLLC has the ability to set up a bidding group for a company with one administrator who can see all bids placed for the same company group.

SITE NAVIGATION - 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.

SITE HELP – Click on the question mark and follow links for further explanations. Review general specifications: <http://www.kelloggllc.com/eratebid3.aspx>

If you have problems accessing the RFP site, or have any questions, please send an email to forms@kelloggllc.com. KSLLC also offers assistance via online Live Chat. Simply click on the "Live Support online" icon to be directed to a KSLLC professional who can assist you.

VIEW RFPs - Once logged in, service providers can view RFPs by Applicant. Once the provider has entered bids, the View RFPs by Applicant choice will include bid information for the logged in provider.

ASK QUESTIONS – Service providers may submit questions online. Select View RFPs by Applicant from the vendor menu, select the applicant, scroll down to the service, and click on the question box displayed to the right of the service. http://www.kelloggllc.com/docs/sp/sp_questions.pdf

PLACE BIDS-

- Place bids for an individual applicant by using the "Place Bids" choice.
- Follow the instructions online to enter bid details. If a line item does not have an associated make/model number, enter a short description (e.g. "installation" "shipping charges").
- Bidders for category two products and services will need to provide pricing by individual site. If more than one site will be utilizing the same service, the bid must clearly list all sites receiving the shared service.
- Bidders for category one services that include pricing for special construction, self-provision, or IRUs will need to upload all detailed documentation including diagrams, project schedules, and pricing for all scenarios requested by the applicant. Include information on installment plans up to four years for the applicant's non-discount share of special construction charges if requested on the applicant's RFP.
- Use the "Print Bids" option to print bids. ALL BIDDERS should PRINT bids to .pdf and review online to ensure the bid amounts are correct.
- Bidders who have not provided signature authorization documents to KSLLC MUST PRINT AND SIGN bids, then E-MAIL all SIGNED bids to forms@kelloggllc.com.
- Bidders with signature / logo authorization forms on file with KSLLC do not need to submit printed and signed bids.

NO late bids will be accepted.

Unless otherwise stated on the individual RFP, All bids must be submitted online by 11:59 pm CST on the due date.

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E. APPLICANT-SPECIFIC RFPs

Applicants may direct service providers to detailed specifications or specific RFPs. An Applicant's RFP instructions override any instructions provided on KSLLC's 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 comply with instructions posted on RFPs may result in disqualification of bid(s).

F. RFP CHANGES

RFP Changes are listed on the bidding site. Select the menu choice "RFP Changes." Review the list frequently!

G. SCHEDULED BIDDERS CONFERENCES & ON-SITE "WALK THROUGHS"

Bidders conferences or walk throughs are posted on www.erate470.com. Review the dates and locations and whether or not attendance is mandatory.

Failure to attend a mandatory conference or walk-through may result in disqualification of bid(s).

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 bidding 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 applicant's RFP closing date.
- bid evaluation grid in Excel for use in evaluating bids received

I. BID EVALUATION

Applicants will select the most cost-effective bids with price of the E-Rate eligible products and services being the primary factor (most heavily weighted). Each applicant may use different criteria which will be listed in the individual RFP for each applicant.

If no bid selection criteria are specified in the RFP, the following criteria will be used:

Factor	Possible Points	Description
Price-E-rate eligible items	30	Price of E-rate eligible products & services (primary factor)
Price-Other Costs	5	Other costs (items not eligible for E-rate discount)
Prior Experience	20	-Experience with similar projects and references (10 points) -Experience with this applicant (10 Points)
Personnel Qualifications	10	-Qualifications of management (5 points) -Qualifications of staff (5 points)
Responsiveness	15	-Responsiveness of the bidder-replied promptly to emails, attended optional on-site walk through if applicable (5 points)

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		-Proximity of sales and service offices (5 points) -Assigned representative is available locally or dedicated representative is comparably responsive (5 points)
Technical Merit	20	-Technical merit of the proposed solution to meet needs of the applicant. Service level agreement if applicable, quality of the solution to meet the needs of the applicant. (10 points) -Compliance with listed requirements of the project scope and bidding requirements, whether or not the proposal includes all information requested; timelines met (10 points)

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's online bidding program will generate a bid number. For bids associated with a service provider who has provided KSLLC with authorization to print a contract, KSLLC will also generate a printed, signed and dated contract. Service providers may also include a link to their custom terms and conditions as part of the standard contract process.

Partial Bids Accepted

Unless otherwise specified on the applicant's RFP, Bidders may submit bids for portions of the requested services or equipment. For example, a service provider may submit a bid for voice lines but not for network switches. Another example would be a service provider may submit a bid for wireless access points but not for caching servers.

If the RFP states "YES" for total network solution, then the applicant would prefer the bidder to submit bids for all items in the network section. For example bids that include network switches, cabling and installation would receive a higher score in quality of solution than bids for network switches only.

Category 2 Budget Requirements

Applicants who request bids for category 2 products and services will conduct a competitive bidding period for the products and services they need on a site by site basis. Once bids are received, the applicant will evaluate the bids based on the responses submitted by the due date. The applicant will then select the winning bidder based on the original bid responses.

Once a bidder is selected for category 2 products and services, the applicant will then have to review the awarded bid on a site by site basis and make changes to the quantities and items selected in order to stay within their category 2 budgets by each individual site. The applicant may contact the awarded bidder to adjust quantities by site in order to meet the Category 2 budget.

The selected service provider is expected to respond timely with revised proposals and contracts for the applicant to ensure that the selected products and services are at or below the per site budget and that the service provider has provided all information necessary regarding reduction in quantities and associated installation, configuration, shipping and handling charges on a per site basis.

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J. BID AWARD NOTIFICATION

Each applicant will use their own method for notifying service providers regarding the award of E-rate bids. USAC will send notification in the form of a Receipt Acknowledgement Letter (RAL) on the USAC EPC Portal to all service providers whose bids are listed on a Form 471 once the Form 471 is submitted.

The Form 471 Receipt Acknowledgement Letter (RAL) issued by USAC to the service provider is NOT A FUNDING LETTER. Funding commitment decision letters will be sent to providers after the application has been reviewed and sufficient funds have been approved by the FCC.

KSLLC will send copies of bids and contracts to service providers upon request. Item 21 detail is included as an integral part of the FCC Form 471 and can be displayed on the USAC web site, www.usac.org/sl.

MANAGED INTERNAL BROADBAND SERVICES (MIBS)

The E-Rate Modernization Order added Managed Internal Broadband Services as an eligible service under Category Two (limited to the applicant's budget allotment).

Bids submitted for MIBS must provide all details necessary to fully explain the services offered. Detailed listing of all equipment to be managed (make, model, part number, serial number, and whether or not equipment is owned by provider or applicant) and full description of services offered.

BASIC MAINTENANCE ADVISORY

Basic maintenance services are subject to each school or library's overall budget on E-rate eligible category two services. Support will only be available for E-Rate eligible products and services as listed on the current year Eligible Services List.

The FCC's 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 service providers will need to provide incident reports for each visit to an applicant's site to perform necessary maintenance. E-rate will not provide funding for maintenance up-front ("unbundled warranty"). Funding will only be issued for the actual cost of labor and repair costs conducted after the provider has identified that an item is damaged, is malfunctioning in some way, or fails, and the service provider repairs or replaces the piece of equipment that 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:

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- 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

Invoicing and Payment

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

1. If SPI, an invoice for the applicant's non-discount 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 10 years following last date of service.**