



RHODE ISLAND SOCIETY
OF TECHNOLOGY EDUCATORS

RFP: Microsoft EES Licensing 2014

Request for proposals to provide volume price agreement and fulfillment of Microsoft Enrollment for Education Solutions Licensing

A joint Cooperative Procurement by the members of the Rhode Island Society of Technology Educators and the Northern Rhode Island Collaborative.

Proposal Submission Deadline:
October 17, 2014

NOTE: Proposals received after the deadline stated above will not be considered

Proposals for this solicitation must be sealed and hand delivered or mailed to:

Northern Rhode Island Collaborative
640 George Washington Highway, Suite 200
Lincoln, RI 02865

Each Proposer is responsible for reading carefully and understanding fully the terms and conditions of this RFP. Only written communications relative to the procurement shall be considered.

The sole point of contact at the Rhode Island Society for Technology Educators, Rhode Island (RISTE) for purposes of this Request for Proposal (RFP) is:

John Bilotta, Executive Director
bilottaj@ri-iste.org

All contact between Proposers and RISTE will be formally made via email through the sole point of contact listed above with the following in the Subject line:

“QUESTIONS - RFP: Microsoft EES Licensing 2014”.

Requests for clarification or additional information must be made via email to the RISTE Executive Director and received no later than **Friday, October 10.**

It is incumbent upon the Proposer to verify RISTE receipt of their questions.

All questions will be answered via email. No oral communications can be relied upon for proposal purposes.

RFP Schedule and Information

Request for proposals to provide volume price agreement and fulfillment of Microsoft Enrollment for Education Solutions Licensing

	<p>Announcement URL</p> <p>http://www.ri-iste.org</p>
	<p>Point of contact:</p> <p>John Bilotta, RISTE Executive Director bilottaj@ri-iste.org</p>
10/3/2014	Request for Proposal is released
10/3/2014 – 10/10/2014	<p>Questions Period</p> <p>All questions from Resellers/Proposers must be formally made via email through the sole point of contact listed above with the following in the Subject line:</p> <p>“QUESTIONS - RFP: Microsoft EES Licensing 2014”.</p>
10/17/2014	<p>RFP Submission Deadline</p> <p>All sealed proposals are due by 4:00pm on October 17, 2014 to: Northern Rhode Island Collaborative 640 George Washington Highway, Suite 200 Lincoln, RI 02865</p> <p>Proposals, amendments to proposals, or requests for withdrawals of proposals arriving after the closing time and date shall not be considered. There shall be no public opening of the proposals. The names of Proposers will not be released until after the award has been made.</p> <p>Proposals received after the deadline stated above will not be considered</p>
10/20/2014– 10/24/2014	Proposal Evaluation Period
10/24/2014	<p>Notification of award</p> <p>All Proposers will be notified of the status of their proposal.</p>
TBD	<p>Post-Award Conference</p> <p>RISTE and contract awardee will meet to finalize logistics.</p>

Procurement Authority

The Rhode Island Society of Technology Educators (RISTE) is an incorporated not-for-profit membership organization dedicated to maximizing the value of educational technology to its members by working with software and hardware Proposers to procure the most effective and appropriate technological resources at the lowest possible price.

Educational institutions throughout Rhode Island rely on RISTE to provide the lowest cost solution for technology purchasing by aggregating the buying power of the state and providing flexible distribution options for hardware, software, online resources, technology furniture, and books. Currently serving 33 public school districts, 276 individual schools, and 14 independent schools; RISTE represents over 128,000 students and thousands of staff. For a list of our current members visit: <http://www.ri-iste.org/page-1727241>

RISTE and the Northern Rhode Island Collaborative, as agents, conduct this request for proposal on behalf of the educational institutions holding current and valid membership in the consortium ("Consortium Members"). The consortium includes all NRIC member districts and schools/districts with current RISTE membership.

RISTE agrees and represents that it has the agreement of all Consortium Members to enter into this request for proposal, and each Consortium Member accepts and agrees to the terms and conditions of this request for proposal, as if it has itself executed the same. Any resulting agreement from this procurement shall be available to other public entities across the RISTE membership through execution of the RISTE membership agreement.

Scope of RFP & Specification

The Rhode Island Society of Technology Educators (“RISTE”) is seeking proposals from Vendor/Reseller providers (“Proposer”) for a price agreement and fulfillment services.

The purpose of this Request for Proposals (RFP) is to establish a contractual relationship with a Microsoft-authorized reseller, to serve the purpose of procuring, supporting, and distributing Microsoft academic volume licensing, products, and services to participants of the RISTE environment in accordance with the RISTE/Microsoft Enrollment for Education Solutions Agreement (Agreement) and the purchase of Microsoft Select Products.

This RFP shall serve to provide the necessary information to potential Proposers and to create the understanding required for the submittal of quality proposals. Proposers must be able to meet or exceed the requirements for the products, specifications and services herein described.

The Proposer must have all the components of the product available and suitably priced, regardless of whether or not they are outlined in the chart contained in the RFP.

All Proposers must submit a Product Pricing Sheet detailing the Estimated Retail Price (ERP), the Proposers Cost Price, and the final price (including the 2% RISTE Administrative fee) that schools will pay to purchase the software under this agreement.

RISTE is seeking one single Proposer to deliver the Microsoft EES licensing and Select programs. Proposer must have successful experience in working with and managing a consortium customer base, including other statewide, K12, or ISTE consortium.

Award of a contract to the selected Proposer may be subject to further approvals including the approval of the State of RI. After award, each RISTE institution in the Agreement will be responsible for issuing its’ own purchase orders and enrollment forms directly to the selected Proposer. The selected Proposer will be the single repository for all records and maintain those records as necessary to ensure compliance of the parties to the Agreement.

Award will be affected on a “Best Value” basis as will best serve the needs of the Consortium and its participants.

Microsoft Select Products

In addition to enrollment in Microsoft EES, RISTE members may purchase Microsoft Software (perpetual license). Proposers/resellers should also include a percentage markup for the full Microsoft Software (perpetual license) product list.

Change in Proposer Representatives

Proposer shall appoint a primary representative to work with the RISTE Executive Director or agreement administrator to maintain, support and market this Agreement. RISTE reserves the right to require a change in Proposer’s then-current primary representative if the assigned

representative is not, in the opinion of the RISTE agreement administrator, serving the needs of the RISTE membership. Proposer must provide RISTE with timely notice of any change in primary representative.

Term - Contract Period

The term for the contract awarded pursuant to this solicitation will be for a three (3) year period effective from the date of contract execution with options to renew for three (3) additional one (1) year terms.

RISTE Administrative Fee

The RISTE administrative fee is to be calculated into the price of all proposal items. Only the item price with the addition of the RISTE administrative fee is presented to the RISTE membership and will be the price paid by the RISTE Member.

Corporate Overview

Proposers must provide a brief history and description of their company and include all personnel, with contact info, who will be supporting this agreement. Please submit an organization chart with a narrative describing how the agreement will be supported. Please identify any Microsoft Licensing awards that your company has won including details of how often and when they were awarded.

References

Proposers must provide references as specified herein. Cited references must be able to confirm, without reservation, the Proposer's ability to perform as mandated in this solicitation. RISTE will rely on references to evaluate the proposal.

Proposers **must** submit at least three (3) ACTIVE references from current or previous educational institutions that have or are currently receiving similar products and services to those proposed.

The contact should be someone who can confirm the actual quality and technical capability of the Proposer's completed work- not the procurement officer.

RISTE reserves the right to take any or all of the following actions: to reject a proposal based on an unsatisfactory reference, to contact any person or persons associated with the referenced site, to request additional references, to contact organizations known to have used in the past or currently using the services supplied by the Proposer or the Proposer's sub Vendors, to contact independent consulting firms for additional information about the Proposer or the Proposer's sub Vendors, and to visit any or all of the reference sites for demonstrations.

Note: The Proposer's references MUST demonstrate the size and scope of each reference provided.

Information required for all references:

Name of Client:	
Name of Contact:	
Address:	
Phone Number:	
Email address:	
Annual Dollar Value of Contract:	
Start Date:	
Completion Date:	
Description of Service	
Justification of Similar Size and Scope	

Financial Viability

RISTE reserves the right to require, during proposal evaluation, that the Proposer provide a copy of its most current Annual Report or audited Statement of Financial Condition to include a Balance Sheet, Income Statement and Cash Flow Statement or other acceptable financial information. These documents may be relied on in any determination regarding Proposer financial responsibility

It is the responsibility of the awarded respondent to maintain an accurate price list for the lifetime of the contract including marking existing products as discontinued and submitting a complete and accurate price list every six months, or more frequently if needed.

Price and product updates

Proposers shall provide the items and services specified at or below the quoted level for the term of any awarded contracts under the agreement. During this period, prices may not change more than once per calendar quarter. Price increases greater than three percent (3%) require written notice of thirty (30) days before taking effect. Written notice shall be submitted to RISTE via email on the Excel Pricing List Template, Exhibit B. Pricing for new products and services may be added at any time to any contract awarded through this RFP process. The Awarded Proposer must provide on the first of each calendar quarter price updates, including discontinued items and any other changes or additions, submitted on the Excel Price List Template in order to ensure accurate RISTE advertised prices. Proposer must provide RISTE with 30 days notice for all pricing increases and product removals before taking effect.

Proposers should provide a plan for communicating with each individual RISTE member school/district to identify their licensing needs. The plan should also include a minimum of two “roadmap” sessions for the consortium to provide planning information for members.

Distribution/Fulfillment Methodology

Proposers are required to submit a cost quote that includes the 2% administrative fee. All proposals submitted in response to this RFP will be compared based on this methodology. Any other method of discounting will not be considered, in order to accurately and fairly compare all Proposers proposals submitted.

Reporting Requirements

RISTE shall have access to reports detailing purchases made by their members.

Quarterly reports shall be required, summarizing sales under this agreement, no later than 30 days after the end of the fiscal quarter. There will be a 2% administrative fee returned to RISTE for each sale made under this agreement after each fiscal quarter.

Notice:

The selected Proposer will begin immediately upon award of the contract to work with RISTE members who are renewing and purchasing from the agreement. Proposer will work with members to assure that licenses coverage remains uninterrupted, necessary documents are in place for the contract starting on December 1st, 2014.

Instructions To Proposers

Proposal Submission and Format

Failure to submit proposals in accordance with the provisions of this Solicitation shall be grounds to declare the proposal as non-responsive.

Responses must be received by the closing date and time, and be delivered in a sealed package to:

Northern Rhode Island Collaborative
Attn: John Bilotta / RFP: Microsoft EES Licensing 2014
640 George Washington Highway, Suite 200
Lincoln, RI 02865

Electronic Submission

The RISTE requires proposers to submit their responses in electronic format. The response must arrive in a sealed package that must contain a USB Flash Drive (preferred) or a CD (hereinafter "media"). The media must contain:

- Exhibit A – A single PDF containing the proposers response (which describes how the Proposer will meet or exceed the scope and specifications listed in the RFP), any proposed contractual changes, and a completed bid signature page.
- Exhibit B – Pricing should be submitted in its native Excel format for ease of scoring. Do not alter the columns or rows other than entering pricing information in appropriate cells. Proposers may add sheets for other products, but do not add to main sheet
- Proposers *may* also submit their full proposal in paper format.

RISTE is not responsible for Proposals submitted in any manner, format or to any delivery point other than as specified.

RFP Terms and Conditions

Change by Addenda

RISTE may change this RFP by Written Addenda

- Proposers must provide Written acknowledgement of receipt of any Addenda on the Bid Signature Page
- RISTE shall issue all Addenda on the company website (www.RISTE.org)
- At its discretion, RISTE may extend the Closing to allow Proposers time to analyze and adjust to changes.
- The failure of a Proposer to acknowledge any addenda shall not relieve the Proposer of the responsibility for complying with the terms thereof.

Modification or Withdrawal

A Proposer may modify or withdraw its Proposal in writing only prior to Closing. Modification or withdrawal must be marked and delivered as described in PROPOSAL SUBMISSION above. Proposers are responsible for ensuring that RISTE receives its modification or withdrawal. Modification or withdrawals must be prepared and submitted on the Proposer's letterhead, signed by an authorized representative of the Proposer. Modifications must state that the modification amends and supersedes the prior Proposal.

The Proposer hereby acknowledges and agrees that these specifications and this RFP process control any contract awarded by this process unless the Proposer expressly states on the Proposal Signature Page alternative terms or conditions the Proposer wishes RISTE to consider. Any such alternative terms or conditions shall constitute a variance and, if material, may subject the proposal to rejection.

All variances from the specifications shall be clearly noted on the proposal to allow for the evaluation of that variance. The lack of notation of a variance may constitute rejection of the proposal.

Withdrawals

When in person the Proposer must present appropriate identification and evidence of authority satisfactory to RISTE.

Proposals submitted by Proposers shall be irrevocable for at least thirty (30) calendar days after the proposal opening date and time.

Late Proposals

Any Proposal received after Closing is late. A Proposer's request for withdrawal or modification of a Proposal received after Closing is late. RISTE will not consider late Proposals, withdrawals or modifications. RISTE reserves the right to consider Proposals that have been delayed or mishandled by RISTE.

Receipt, Opening and Recording Proposals

Proposals will be opened and recorded. The number of Proposals received, the identity of Proposers will be disclosed to the public at the time of opening.

The content of proposals will not be disclosed until all proposals have been evaluated, negotiations completed if required, and Intent to Award has been published.

Multiple Awards

RISTE reserves the right to elect, in its sole discretion, to make multiple awards. The number of awards shall be based on the anticipated member need and service, and awardees will be selected based upon the point totals awarded through the proposal scoring process. This notice of multiple awards does not preclude RISTE from awarding a single Contract.

Questions, Changes and/or Clarification

All questions regarding this RFP must be submitted in writing will via email through the sole point of contact with the following in the Subject line:

“QUESTIONS - RFP: Microsoft EES Licensing 2014”.

Requests for clarification or additional information must be made via email to the RISTE Executive Director and received no later than **Friday, October 10.**

It is incumbent upon the Proposer to verify RISTE receipt of their questions.

All questions will be answered via email. No oral communications can be relied upon for proposal purposes.

Proposers may request changes or clarification to, or protest, the terms and conditions and/or the specifications of this RFP:

All Proposers can access RISTE's determination (i.e. entirely rejects or agrees with) to any questions, changes, or clarification on RISTE's website.

Cancellation of the RFP

RISTE may cancel this RFP, in whole or in part, or reject all proposals submitted in response to the RFP when such action is determined to be fiscally advantageous to the organization.

Solicitation, Proposal Acceptance, Award and Discussions

This RFP creates no obligation on the part of RISTE to award a contract or to compensate Proposers for proposal preparation expenses. RISTE reserves the unilateral right to cancel this solicitation at any time and to accept or reject any and all proposals, in whole or in part, received in response to this RFP; the unilateral right to award a contract in whole or in part; to award a contract to one Proposer; to waive or permit cure of minor irregularities; and to conduct

discussions with Proposers in any manner necessary to serve the best interest of RISTE.

General Terms and Conditions

The following terms and conditions apply to any contract awarded through this RFP process and will be incorporated by reference.

Awarded Proposers may not materially change or alter the terms, conditions, and prices from the Original Contract between the Awarded Proposer and the Consortium Members.

RISTE reserves the right to determine if any item, article or material complies substantially in quality and performance with the specifications, and if any variance listed in the proposal is material or immaterial.

Oral instructions or information concerning this or any RISTE request for proposal process given out by directors, officers, employees or agents of RISTE to prospective Proposers shall not bind RISTE and shall not be relied upon.

RISTE reserves the right to reject any or all proposals, return unopened any proposal received after the specified closing time, or require a Proposer to furnish additional material which provides evidence that the items quoted meet all of the specifications published in this document

The contents of proposals shall be considered confidential and will not be made public record, except in instances where Consortium Members require verification of the competitive bid process in compliance with state law.

For physical items shipped, the Awarded Proposer must replace any items damaged or lost en route within thirty (30) days after notification by RISTE member of such damage or loss. The Awarded Proposer is responsible for prosecuting all damage claims with the freight companies. Payment will be withheld until damaged goods are replaced.

Unless otherwise informed, RISTE members will expect all deliveries to be completed as requested.

Failure to meet the delivery schedule may result in the cancellation of an order except in the event where labor strikes, natural disaster, or other circumstances beyond the control of the Awarded Proposer directly affect the delivery schedule. The Awarded Proposer must notify and provide evidence to the RISTE member via mail or fax within twenty (20) business days from the date the RISTE member places an order to claim an exception from the specified delivery schedule. Delays in the delivery schedule not expected that cause additional shipping expenses, up to and including airfreight shipments, to insure timely delivery of product as requested by a RISTE member, will be the sole responsibility of the Awarded Proposer.

Proposal Signature Page

The undersigned hereby agrees to the specifications, terms and conditions of this request for proposals from Proposers to provide Chromebooks products and related services.

The undersigned acknowledges his authority to submit this proposal on behalf of the Proposer listed below and bind it to comply with these specifications, terms and conditions if any contract is awarded through this RFP process.

Furthermore, the undersigned certifies conformance to applicable Federal laws, Oregon Revised Statutes, and Oregon Administrative Rules concerning public contracts, and that this proposal is made without connection with any person, firm or corporation making a proposal for the same goods or services, and is in all respects fair and without collusion or fraud.

Name of Company Proposing: _____

Contact Person: _____

Email Address: _____

Address of Company Proposing _____

City: _____ State: _____ ZIP: _____

Telephone Number: () _____

Federal Tax ID No: _____

Name of Person Filling out Proposal (print) _____

Title: (print) _____

Signature: _____ Date: _____

(Must be signed by an officer or duly authorized company representative.)