



COMMUNICATIONS AND CONSULTING

BID EVALUATION LETTER

PROJECT TITLE: RFP for CETPA California Statewide Microsoft Licensing Agreement

BID/RFP No.: 364-11NE

REPORT DATE: August 2, 2011

The California Educational Technology Professional's Association (CETPA) has contracted Infinity Communications and Consulting, Inc. (Infinity) to provide professional services to plan, design and manage the bidding process for the above project. Per our agreement, Infinity prepared the bid documents and specifications necessary to solicit competitive bidding and to award a statewide contract to the lowest responsive bidder, in conformity with public contract code and California Education Code requirements.

The following statement is a recap of the process that has been instituted specifically for the above titled project:

- The RFP documents were prepared after conferring with CETPA staff, subject matter experts and CETPA's legal counsel.
• The project was posted on Infinity Communications' project website on July 4, 2011.
• Twenty three (23) prospective bidders downloaded the RFP from the Infinity website.
• Six (6) Microsoft Large Area Resellers downloaded the RFP from the Infinity website.
• Bids were due on July 26, 2011 @ 11:00am at the Bakersfield offices of Infinity
• Three (3) Bid responses were received on or before the bid date.
• Infinity staff provided copies of all three bids to the CETPA interview team and legal counsel and did a preliminary review of all three bids.
• The review committee interviewed all three bidders in Sacramento on Friday, July 29, 2011.

Bid Results

Table with 2 columns: Bidder Name and Bid Amount. Rows include SHI (2.5%), Dell (5.5%), and CDW-G (7.07%).

Important Considerations

Per the bid documents, several items needed to be reviewed to make sure the individual proposals were in conformance with the intent of the project documents including price, contract terms and conditions, the ability to get Erate and California Microsoft Voucher discounts, their marketing and customer service plans, they had the experience and background to manage a statewide contract and had a good reputation within the California K-12 education community.

A review committee including Steve Carr, Greg Lindner, Andrea Bennett and myself read all three proposals and ultimately interviewed all three bidders.

After receiving the proposals but before interviewing all three bidders, Infinity sent over all of Dell's and CDW-G's contract terms and conditions exceptions to Mark Williams at Fagen Friedman & Fulfro, CETPA's legal counsel for this project. Mr. Williams then provided input to the interview committee and those issues were then brought to the attention of CDW-G and Dell. Today, August 2, 2011 both parties returned their comments. Both parties modified and reduced the amount and severity of their contract exceptions. Our office then sent these modifications and clarifications to the interview committee and CETPA's legal counsel. By consensus, we all felt it was better go with SHI since they took no exceptions to the contract terms and conditions to minimize the downside risk to CETPA and those educational organizations that may choose to purchase off of this statewide contract.

All three bidders had excellent references and seemed to all have the experience to manage this statewide contract. All three bidders had current Erate Service Provider Identification Numbers and Microsoft Voucher documentation and all three appeared to have long histories participating in these programs.

Of the three bidders, only SHI took no exceptions to the contract terms and conditions.

By far, SHI's price was the lowest. SHI was the only bidder that provided detailed information how they proposed to market this plan to California schools and did an impressive job outlining how long it would take to ramp up to get this project started.

The committee felt that the documentation provided by CDW-G and Dell was not as complete as SHI and, thus, harder to gauge how well they would do managing this statewide contract and successfully marketing this program to all public and private school districts in the state of California.

#### **Infinity's Recommendation**

**Contract Award:** Infinity recommends award of this contract to the lowest responsive bidder, **SHI**

If the CETPA board needs any further documentation or information regarding this matter, please don't hesitate to contact our office.

Thank you,



Fred Brakeman RCDD, CSI  
President  
Infinity Communications and Consulting, Inc.