

# REQUEST FOR PROPOSAL

## PROJECT NO. 059-12M.1– MICROSOFT PRODUCTS – DISTRICT-WIDE

The Wasco Union Elementary School District and its RFP Manager, Infinity Communications and Consulting, Inc., is seeking bids for the specified Microsoft Products.

### **PROPOSAL DUE DATE: NOVEMBER 30, 2011 AT 2:00 PM**

All inquiries concerning the project should be directed to:

Fred Brakeman  
Infinity Communications and Consulting, Inc.  
1800 30<sup>th</sup> St. Suite 175  
Bakersfield, CA 93301  
(661) 716-1840  
(661) 716-1841 Fax  
[fbrakeman@infinitycomm.com](mailto:fbrakeman@infinitycomm.com)

It is mandatory that all contractors wishing to provide a bid on this project shall deliver their bids to **Infinity Communications; 1800 30th Street, Suite 175, Bakersfield, CA 93301**, no later than November 30, 2011 at 2:00 pm. Bids received after the due date or other locations will not be accepted.

### **BID PACKAGE**

1. Proposals are to be marked as follows:

#### **PROJECT NO. 059-12M.1– MICROSOFT PRODUCTS – DISTRICT-WIDE**

**VENDOR SHALL PROVIDE ONE (1) ORIGINAL AND TWO (2) COPIES OF THEIR PROPOSAL ON THE DAY OF THE BID.  
DOCUMENTS SENT VIA EMAIL WILL NOT BE ACCEPTED.**

2. **Bid Form** – Contractor will complete and submit the attached Bid Form as a part of their bid package. A description and scope of the project is supplied in this RFP.
3. **Contract/Purchase Order** – The Owner shall issue a purchase order to the bidder that provides the best solution to the district.
  - a. **Terms and Conditions** – The Owner would like to receive proposals that are based upon a 1 year contract term and a second option for a 3 year contract term. The initial 1 year contract term shall start: Approx. December 1, 2011. An extension option must be mutually acceptable to both parties. Any request for and acceptance of an extension shall be in written form, and shall include any requests and justifications for adjustment in compensation. If vendors can provide “better” rates by extending the length of contract, please provide this option as part of your RFP response.
  - b. **Piggybacking Option** – The Owner intends to have this contract be available for “piggybacking”, by other school districts, pursuant to Public Contract Code 20118.

4. **Products and Services Sought** – The Owner currently utilizes the following Microsoft EES products and is requesting pricing on the items and quantities listed below. However, the Owner reserves the right to select other software licenses in the Microsoft EES family of software services as its needs change over the term of the Agreement. See page 8 for more information. It therefore seeks to have pricing set for other, related products. Please give pricing on:
- |    |           |                                  |         |
|----|-----------|----------------------------------|---------|
| a. | 2UJ-00003 | Desktop + the Enterprise CAL     | qty-231 |
| b. | P72-00165 | WinSvrEnt ALNG LicSAPk MVL       | qty-9   |
| c. | 810-03312 | SQLSvrEnt ANLG LicSAPk MVL 1Proc | qty-6   |

**VENDOR QUESTIONS PRIOR TO BID**

The bidder shall submit a written request at least ten (10) days before the bid opening date and hour for all requests for clarifications regarding the scope of work or contract terms and conditions, substitution to the materials, processes, services, equipment specified or a changes to the terms and conditions as stated in the RFP. If the substituted item or contract language is acceptable, the OWNER will approve it in an Addendum issued to all bidders of record. Requests received less than ten (10) days prior to bid opening will not be considered. All quotes received that do not comply with the entire scope of work described in said documents will be considered incomplete and the Owner reserves the right to list the Vendor’s quote as non-responsive.

**The last day to submit questions is November 20, 2011.**

**VENDOR CRITERIA AND CONTRACT REQUIREMENTS**

The requirements outlined in this document will apply to all contracts entered into as a result of the posting of **PROJECT NO. 059-12M.1– MICROSOFT PRODUCTS – DISTRICT-WIDE.**

See the Specification for information on specified system requirements.

All State of California licensing requirements for public schools apply.

Since many member agencies may apply for Erate funding and/or Microsoft Voucher monies, these projects and services MAY depend on partial funding from the E-rate program and the California Microsoft Settlement program. We expect each vendor to make themselves intimately familiar with any rules or regulations regarding the E-rate and Microsoft Settlement programs. The contractor is responsible for providing a valid Erate SPIN number with their proposal(s) and evidence that they are also a California Microsoft Voucher Program Approved Provider.

Prospective vendors must be willing and able to provide a portfolio describing experience with comparable projects in the K-12 customer market, their marketing plan they propose for this project and their Erate SPIN number and their California Microsoft Voucher Program Approved Provider certification. Vendors must meet the following qualifications in order to be considered:

1. Vendor must provide the best Microsoft educational discount pricing.
2. Along with pricing, the Vendor must provide documentation on all other value added services they will provide to the Owner and other public agencies that may choose to purchase off of this piggyback contract.
3. Vendor must be able to warranty the equipment for a period of one year plus agree to extend any/all manufacturer warranties at no additional cost to the District.

4. Vendor must already be a Microsoft North American Large Account Reseller (LAR).

**BID EVALUATION PROCESS**

The Owner will evaluate and select the winning bid based on the following criteria:

1. **Price** – Price will be the highest weighted factor but it is not the only factor
2. **Accuracy of Bid or Bid Response** – The District will evaluate the bid response for completeness, amendments, exceptions, and bid as specified or alternate specified.
3. **Other Value Added Services** – The District will be evaluating the vendor’s other value added services they shall provide as a part of this service.
4. **Experience** – The District will evaluate Experience based on the following criteria:
  - a. Total Number of like statewide or large programs (not using subcontractors) that match the scope of work specified for this project, in the last three years.
  - b. Experience and qualifications of the Vendor’s staff that shall be assigned to this project
5. **Qualifications** – The District will evaluate Vendor Qualifications based on the following criteria.
  - a. Number of years as a Microsoft Large Area Reseller (LAR).
  - b. Experience with public school work.
  - c. Number of similar projects maintained.
  - d. Number and quality of references provided.
6. **Service** – The District will evaluate Service based on the following criteria.
  - a. Help Desk Operations.
  - b. Ordering Process .
  - c. Service and Support.

<b>Selection Criteria</b>	<b>Weight*</b>
Price	30.0%
Accuracy of Bid Response	20.0%
Other Value Added Services	20.0%
Experience	10.0%
Qualifications	10.0%
Service	10.0%
	<b>100%</b>

**RIGHT TO REJECT ANY AND ALL QUOTES**

We reserve the right to reject any or all bid proposals and to waive any informalities or irregularities. The vendor’s submission of a proposal is recognition of this right.

**SCOPE OF WORK**

**General considerations and recommendations to keep in mind:**

- ❖ Price is **not** the absolute and end-all criteria when selecting a reseller with the goal of creating a positive and productive experience for the public and private schools that shall purchase these services.
- ❖ Red carpet support, training, & communication by the reseller with CA public and private schools should be held in high regard as it will result in higher customer experience and satisfaction, as well as increased efficiency and ROI on the participants investment in technology

- ❖ The reseller should have a proven track record and supporting references for the management and support of projects of similar size and scope of this project.
- ❖ In all aspects of the relationship the reseller should agree to conditions of satisfaction and be held accountable to these terms and conditions set forth in the agreement both parties shall sign.
- ❖ Since the intent of this RFP is to provide the Owner and other public and private schools the ability to utilize all available discount programs to help pay for this service, it is a requirement that the reseller must agree to participate in the Erate program, have a current Erate Service Provider Identification Number and also agree to participate in the California Microsoft Settlement program

**General language for consideration of inclusion within a Request for Proposal (RFP):**

The purpose of this Request for Proposal (RFP) is to establish a contractual relationship with a Microsoft Authorized North American Large Account Reseller (LAR) to serve the purpose of consulting, procuring, supporting, and distributing Microsoft academic volume licensing, products, and services to the Owner and California education community.

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

At this time the Microsoft Academic Volume Licensing program includes:

- Campus and School Agreement

The Owner is seeking one single LAR to support and deliver all licensing programs (at this time the Campus and School Agreement). LAR must have successful experience and references in working with a consortium customer model. LAR shall appoint a primary representative to work with the Owner's representative and the Owner's representative of those agencies that purchase off of this piggybacking project.

Award will be affected on a "Best Value" basis as will best serve the needs of the Owner and its participants.

**LAR Agreement Requirements**

The following paragraphs indicate the expected scope of the Microsoft Agreement/Purchase Order and requirements to be carried out by the LAR that is awarded the Microsoft Agreement/Purchase Order. LARs are required to indicate their ability to satisfy the requirements as detailed below:

1. Only proposals from Microsoft Authorized North American Large Account Resellers (LAR) will be considered. The LAR must have a very good relationship with Microsoft.
2. The LAR will provide Microsoft software products and related LAR services for the Microsoft Software License Agreement to the Owner and Authorized Users.

3. The LAR will be required to work closely with the Owner and ensure the required documentation is in place as needed. Participants will subscribe to a product baseline (i.e. desktop SKU with Core CAL for faculty/staff) with the option to a variety of other products.
4. The LAR will be required to execute the numerous enrollment options available from Microsoft. The LAR is required to thoroughly review the provisions of the Microsoft Agreement, submit an executed Enrollment Agreement and obtain an Enrollment Number, prior to placing orders under this contract.
5. The LAR will provide all sales, support, management and reporting services required to process and account for "Authorized User" requests for Microsoft software products and LAR services under the applicable Microsoft Software License Agreement.
6. The LAR will act as the primary liaison with the Owner and participating members and therefore will assign a dedicated sales team specific to the Owner including representatives residing in CA, tele-presence team members available within CA business hours, and Microsoft Licensing and Technical specialists. It is required that members of this team be thoroughly trained and experienced in the requirements and processes related to Microsoft consortia agreements, academic licensing programs, related software assurance benefits, and Microsoft products and solutions.
7. The LAR will be responsible for servicing and administering each enrollment underneath the agreement, ensuring prompt processing of all enrollment forms, and ensuring each enrollment is properly placed against the Microsoft Software License Agreement.
8. The LAR will provide requested written and/or oral contract quotations to Authorized Users which is to include at a minimum:
  - a. Microsoft Product Number
  - b. Microsoft Product Name
  - c. Quantity
  - d. Price
9. The LAR will promptly report all orders to Microsoft in accordance with the provisions in the applicable agreement.
10. The LAR will generate and issue electronic and paper copy "Order Confirmation Reports" for each software product (i.e. license and/or maintenance) ordered by the Owner and other authorized users. This report will be issued for purchases, including those orders that may be aggregated on a single purchase order document, and provided to authorized users within 15 days after request and should include, at a minimum:
  - a. The name of Authorized User (ordering entity)
  - b. Authorized User's purchase order number to LAR
  - c. Microsoft Master Agreement Number
  - d. Microsoft Enrollment Number
  - e. Microsoft product number and quantity ordered
  - f. Microsoft product description (Software language and/or version number)
11. The LAR must provide and support a website for Microsoft Electronic Software Distribution Program (ESD) for each participating school for purposes of electronic software distribution.

12. The LAR must provide and support the electronic software distribution program for students, faculty, and staff in support of Student Option, Work at Home Rights, and Home Use Program.

### Active and Inactive Reference Templates

Vendor Name:	
Contractor shall provide information on at least one (1) and preferably a minimum of three (3) ACTIVE contracts within the last three years similar in size, scope, and technical complexity to the Scope of Work of this RFP.	
The contact should be someone who can confirm the actual quality and technical capability of the Contractor's completed work- not the procurement officer	

<u>3.3.1.1 ACTIVE CONTRACT REFERENCE 1</u>	
Name of Client:	
Name of Contact:	
Address:	
Phone Number:	
Annual Dollar Value of Contract:	
Start Date:	
Completion Date:	
Description of Service	
Justification of Similar Size and Scope	

<u>3.3.1.2 ACTIVE CONTRACT REFERENCE 2</u>	
Name of Client:	
Name of Contact:	
Address:	
Phone Number:	
Annual Dollar Value of Contract:	
Start Date:	
Completion Date:	
Description of Service	
Justification of Similar Size and Scope	

<u>3.3.1.3 ACTIVE CONTRACT REFERENCE 3</u>	
Name of Client:	
Name of Contact:	
Address:	
Phone Number:	
Annual Dollar Value of Contract:	
Start Date:	
Completion Date:	
Description of Service	
Justification of Similar Size and Scope	

### 3.3.2 Inactive References

Vendor Name:	
<p>Contractor shall provide information on at least one (1) and preferably a minimum of two (2) INACTIVE contracts within the last three years similar in size, scope, and technical complexity to the Scope of Work of this RFP.</p> <p>The contact should be someone who can confirm the actual quality and technical capability of the Contractor's completed work- not the procurement officer</p>	

<u>3.3.2.1 INACTIVE CONTRACT REFERENCE 1</u>	
Name of Client:	
Name of Contact:	
Address:	
Phone Number:	
Annual Dollar Value of Contract:	
Start Date:	
Completion Date:	
Description of Service	
Justification of Similar Size and Scope	
Justification for Inactivity	

<u>3.3.2.2 INACTIVE CONTRACT REFERENCE 2</u>	
Name of Client:	
Name of Contact:	
Address:	
Phone Number:	
Annual Dollar Value of Contract:	
Start Date:	
Completion Date:	
Description of Service	
Justification of Similar Size and Scope	

### Sample Bid Pricing

This is just an example of products needed. The entire Microsoft EES suite needs to be priced out.

**\*\*Note – Provide EES pricing where applicable, and if available, any additional discounts made available under the proposal because this is a “piggyback” RFP.**

Enrollment for Education Solutions		Quantity	Unit Price	Discount %	Piggybacking Option
	<i>This is a sample of the Microsoft Products to be submitted during the RFP response. Reseller will be required to sell all products eligible under the Enrollment for Education Solutions with the same level of discounts for each SKU below Microsoft's published price.</i>				
<b>Desktop Options</b>					
FQC-02425	WinPro ALNG UpgrdSAPk MVL				
FQC-03024	WinPro ALNG UpgrdSAPk MVL wMDOP				
2FJ-00001	OfficeProPlusEdu ALNG LicSAPk MVL				
2UJ-00001	DsktpEdu ALNG LicSAPk MVL				
2UJ-00003	DsktpEdu ALNG LicSAPk MVL EntCAL				
WSB-00068	DsktpOptmztnPkforSA ALNG SubsVL MVL PerDvc forWinSA				
<b>Server Options</b>					
6PH-00298	LyncSvrEnt ALNG LicSAPk MVL				
H04-00232	SharePointSvr ALNG LicSAPk MVL				
USD-00418	SQLSvrDatactr ALNG LicSAPk MVL 1Proc				
810-03312	SQLSvrEnt ALNG LicSAPk MVL 1Proc				
MFF-00502	SysCtrCltMgmtSte ALNG LicSAPk MVL PerOSE				
J5A-00186	SysCtrCnfgMgrCltML ALNG LicSAPk MVL PerOSE				
<b>Services</b>					
54R-00098	MSLrningITAcademy ALNG SubsVL MVL Srvcs				