



R-20/21-05

E-Rate Consultant

Issue Date: 11/3/2020

Questions Deadline: 11/17/2020 12:00 PM (CT)

Response Deadline: 11/24/2020 01:00 PM (CT)

Contact Information

Contact: Heather Falls

Address: Purchasing

702 SE 291 Highway

Lee's Summit, MO 64063-4306

Event Information

Number: R-20/21-05
Title: E-Rate Consultant
Type: Request for Proposal
Issue Date: 11/3/2020
Question Deadline: 11/17/2020 12:00 PM (CT)
Response Deadline: 11/24/2020 01:00 PM (CT)
Notes: The Lee's Summit R-7 School District is soliciting proposals for an E-Rate Consultant. This contract will include but is not limited to: eRate agent services that the District deems necessary, such as representing the District in all matters pertaining to technology related issues for phone services, Internet Services, internal connections and maintenance of internal connections. Lee's Summit R-7 School District (or the "District") is requiring proposers to submit their proposals electronically. Electronic submission help eliminate errors, eliminate unnecessary work, and is more friendly to the environment. Lee's Summit R-7 School District will not accept proposals that are submitted via email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all responders to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.

If you are having difficulty submitting electronically, please contact Heather Falls at 816-305-7632 or email heather.falls@lsr7.net for instructions.

It is the responsibility of interested firms to check <https://lsr7ebid.ionwave.net> for any addendums or notices of information prior to the opening date and time of this RFP.

Billing Information

Address: 301 NE Tudor Rd
Lee's Summit, MO 64086-5702
Phone: (816) 986 x1000

Bid Attachments

General Terms & Conditions for RFPs, RFQs and Bids.pdf

General Terms & Conditions

[Download](#)

1_- Sample_Insurance_Certificate.pdf

Certificate of Insurance

[View Online](#)

3_- E-Verify-LSR7_(1) (1).pdf

E-Verify

[View Online](#)

4_- MO_Tax_Exemption_Certificate.pdf

Missouri Tax Exemption Certificate

[View Online](#)

Bid Attributes

1 Introduction

The Lee's Summit R-7 School District is soliciting proposals for an E-Rate Consultant. This contract will include but is not limited to: eRate agent services that the District deems necessary, such as representing the District in all matters pertaining to technology related issues for phone services, Internet Services, internal connections and maintenance of internal connections. Lee's Summit R-7 School District (or the "District") is requiring proposers to submit their proposals electronically. Electronic submission help eliminate errors, eliminate unnecessary work, and is more friendly to the environment. Lee's Summit R-7 School District will not accept proposals that are submitted via email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all responders to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.

2 Instructions to Respondents

1. All questions regarding this RFP shall be submitted online via the "Questions" tab of this bid opportunity. The District reserves the right to reject any and all proposals, to waive technical defects in proposals, and to select the proposal(s) deemed most advantageous to the District.
2. It is the responsibility of each respondent before submitting a proposal to examine the documents thoroughly and request written interpretation or clarifications soon after discovering any conflicts, ambiguities, errors, or omissions in the proposal documents. Requests for clarification must be submitted online via the "Questions" tab.
3. Changes to the specifications will not be allowed except by written addendum issued by the District through this online procurement system. Oral explanations or instructions given prior to award will not be binding.
4. Respondent shall quote net costs of all goods and services requested and all quotes shall include all transportation to destination and inside delivery.
5. There will be no public opening of the proposals.
6. Acceptance of this proposal or any part thereof, in writing, within ninety (90) days after the closing date, by the District shall constitute a legal and binding agreement; wherein, the vendor shall furnish the services in accordance with the specifications and offeror's proposal on the written order of the District.
7. The District reserves the right to award this contract in its entirety or to split the contract among bidders, whichever is in the best interest of the District. The District may accept any item or group of items of the bid unless qualified by specific limitation of the bidder.
8. To be considered, a firm must have at least three (3) proven clients of similar size to our district.

I have read and understand.

(Required: Check if applicable)

3 SELECTION PROCESS

The proposals will be evaluated by a District Selection Committee (DSC) comprised of selected District personnel. The overall process may consist of two steps: the first being a review and evaluation of all responsive proposals and the second being the interview phase for the short list of respondents selected for interview, if applicable.

Step One: Evaluation of Proposals

Members of the DSC will review and rate each responsive proposal based on the following criteria:

- a. The firm's experience in providing similar services to school districts or governmental agencies during the past five (5) years.

- b. Key personnel that will be assigned to the District's project, and their experience with similar projects.

- c. Applicable resources offering quality assurances/quality control procedures; as well as adequacy of team/resources to complete the project within the proposed time-frame.

- d. Project approach including project schedule and detailed approach to complete this project, familiarity with this project, identification of unique issues related to project, and the process proposed for communications with District staff.

- e. Cost

The Proposal Ranking Sheet for the evaluation of the proposals is included in this RFP. The DSC may request additional submittals.

Step Two: Interviews/Demonstrations (If Applicable)

4 Responding to Attributes

There are attributes, including this one, associated with this proposal. Some are notes and require no response, but most have a required response. ****Please select each page from the bottom right-hand side of this list of attributes in order to view the next page of Bid Attributes.****

5 Attachments Required

Be sure to upload all required documents and forms to the "Response Attachments" Tab.

6 Purchase Agreements

Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, lead time, and determined to be in the best interest of the District. The bid award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the bid that is in the best interest of the District.

I have read and understand.

(Required: Check if applicable)

7 Terms of This Bid

The terms of this bid shall remain in effect for at least one year from date of award. All prices MUST remain firm during that time period. The District may make additional purchases at the itemized price listed in the bid packet for a period of one (1) year. The District may, at its option, renew the Contract for up to three (3) additional one-year contract periods by giving written notice to the supplier.

I have read and understand.

(Required: Check if applicable)

8 Bid Pricing

After the first year, the vendor may submit a price adjustments to the District based on a Manufacturer's Revised Published Price List. The request MUST contain a written notification from the manufacturer to the supplier or vendor of price increases. The Revised Published Price List or manufacturer's notification shall be submitted to the District at least thirty (30) calendar days prior to the effective date of the new price to be charged to the District. It shall be understood that such price adjustments shall not exceed the amount passed onto the supplier or vendor by the manufacturer. It shall be further understood that the District reserves the right to reject any price adjustments submitted by the bidder and/or to terminate the contract with the bidder based on such price adjustments.

The successful bidder(s) must agree to accept the District's Purchase Order or the District's Mastercard P-card for the work order. These purchases are tax exempt.

The Lee's Summit R7 School District will review all bid submissions with regards to pricing, product performance, equipment features, references and experience. The District plans to award the bid within 60 days after the bid opening.

I have read and understand.

(Required: Check if applicable)

9 Communications Statement

Communications: Contact between vendors and Lee's Summit R7 personnel during the proposal process or evaluation process is prohibited. Any attempt by vendors during the proposal process to contact Lee's Summit R7 personnel may result in disqualification. All communication shall go through the Purchasing and Contracts Department during this competitive process. All questions received and the corresponding answers will be distributed to all bidders. No verbal responses will be provided. The deadline for questions about this proposal is stated in the Bid Activities and the district will not respond to questions after this time and date. Response to questions will be posted in the form of an addendum to this proposal. The vendors will be responsible for checking the website for any posted addenda.

I have read and understand.

(Required: Check if applicable)

10 General Terms and Conditions

I have downloaded and read the General Terms and Conditions from the ATTACHMENTS tab. By selecting this box, I agree to the terms and conditions.

I have read and agreed to the T&C

(Required: Check if applicable)

11 Proposal Requirement

PROPOSAL REQUIREMENTS

1 **Scope**

2 Specifications:

The Lee's Summit R-7 School District is soliciting proposals for an E-Rate Consultant. This contract will include but is not limited to: eRate agent services that the District deems necessary, such as representing the District in all matters pertaining to technology related issues for phone services, Internet Services, internal connections and maintenance of internal connections.

I have read and understand.

(Required: Check if applicable)

1 **SPECIFIC REQUIREMENTS OF RFP:**

3

1. Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, and service, and determined to be in the best interest of the District. The RFP award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the proposal that is in the best interest of the District.
2. The terms of this RFP shall remain in effect for at least one year from date of award. All prices MUST remain firm during that time period.
3. Respondents are expected to bid on the equipment item as listed on the Equipment Specifications List. If there are any deviations from the specifications listed, the respondent is expected to make note on the bid form. The District reserves the right to determine the successful respondent and will make that decision based on the best interest of the District. (not needed for service)
4. After a year, the vendor may submit a price adjustments to the District based on a Manufacturer's Revised Published Price List. The request MUST contain a written notification from the manufacturer to the supplier or vendor of price increases. The Revised Published Price List or manufacturer's notification shall be submitted to the District at least thirty (30) calendar days prior to the effective date of the new price to be charged to the District. It shall be understood that such price adjustments shall not exceed the amount passed onto the supplier or vendor by the manufacturer. It shall be further understood that the District reserves the right to reject any price adjustments submitted by the respondent and/or to terminate the contract with the respondent based on such price adjustments.
5. The successful respondent(s) must agree to accept the District's Purchase Order or the District's Mastercard P-card for the order. These purchases are tax exempt.
6. The Lee's Summit R7 School District will review all proposal submissions with regards to pricing, product performance, and equipment features. The District plans to award the RFP within 30 days after the RFP opening.

1 **Schedule of RFP Process**

4

Timeline for RFP Process:

The timeline listed below is the District's estimation of time required to complete the RFP process. All efforts shall be made to abide by this schedule; however, it is subject to change due to different circumstances.

- RFP Notification 11/3/2020
- Receive Proposals 11/24/2020
- School Board 12/17/2020
- Notice to Proceed 12/18/2020

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No Deviations or Exceptions

Bidders are expected to bid on the items as listed on the Equipment Specifications List, or Scope of Work. If there are any deviations from the specifications or scope of work listed, the bidder is expected to make note, along with a brief description in the next below. The District reserves the right to determine the successful bidder and will make that decision based on the best interest of the District.

I have read and agree.

(Required: Check if applicable)

1
6

Deviations and Exceptions

If your company intends to deviate from the Specifications listed in the attached documents, all such deviations and exceptions must be listed here, with complete and detailed conditions and information included. The District will consider any deviations or exceptions in its bid award decisions. The District reserves the right to accept or reject any proposals based upon any deviations indicated below.

If none, please enter N/A (Not Applicable).

(Required: Maximum 4000 characters allowed)

1
7

Cooperative Procurement with Other Jurisdictions

This section is optional; it will not affect the agreement.

1) Sales will be made in accordance with the prices, terms, and conditions of the Request for Proposals and any subsequent term agreement.

2) There shall, however, be no obligation under the cooperative procurement agreement for any organization represented by MACPP or MARC to utilize the proposal or agreement unless they are specifically named in the Request or Proposals as a joint respondent.

3) All sales to other jurisdictions will be made on purchase orders issued by that jurisdiction. All receiving, inspection, payments and other agreement administration will be the responsibility of the ordering jurisdiction.

4) Each jurisdiction that is a party to the joint proposal has authority to act as Administrative Contracting Officer with responsibility to issue purchase orders, inspect and receive goods, make payments and handle disputes involving shipment to the jurisdiction.

If the District awarded you the proposed agreement, would you sell under the prices and terms of this agreement to any public school district or any other non-profit organization having membership in the Mid-America Council of Public Purchasing (MACPP) or Mid-America Regional Council (MARC) and located within the greater Kansas City metropolitan trade area? (All deliveries shall be F.O.B. Destination and there shall be no obligations on the part of any member of said Council to utilize this agreement).

Yes No

(Optional: Check only one)

1
8 **Consultant Profile**

CONSULTANT PROFILE

1
9 **Lead Consultant Name**
Enter the Lead Consultant Firm(s) (or Joint Venture) name.

(Required: Maximum 1000 characters allowed)

2
0 **Lead Consultant Address**
Enter the Lead Consultant Firm(s) (or Joint Venture) address.
street
city, state zip

(Required: Maximum 4000 characters allowed)

2
1 **Lead Consultant Provider**
Please designate the service area provided by the lead consultant.

Local Regional National

(Required: Check only one)

2
2 **Year Provider Firm Established**
Please enter the year the provider's firm was established.

(Required: Numbers only)

2
3 **Years of Experience**
Please enter the number of years of experience providing this service.

(Required: Numbers only)

2
4 **Licensed in Missouri**
Are you licensed to do business in the State of Missouri?

Yes No

(Required: Check only one)

25 **Principal Contact**
Please provide name, title, telephone number and email address of Principal contact

(Required: Maximum 4000 characters allowed)

26 **Address of Office to Perform Work**
Please provide address of office to perform work if different than Lead Consultant Firm address.

(Optional: Maximum 4000 characters allowed)

27 **Number of Persons Committed to District's Project**
Please list the number of persons by discipline that your Firm/Joint Venture will commit to the District's project

(Required: Numbers only)

28 **Joint Venture Areas of Responsibility**
If submittal is by Joint Venture or utilizes subcontractors, list participating firms/providers and outline specific areas of responsibility (including administrative and technical) for each firm.

(Optional: Maximum 4000 characters allowed)

29 **Has This Joint Venture Previously Worked Together?**
Has This Joint Venture Previously Worked Together?
 Yes No
(Optional: Check only one)

30 **Key Outside Consultants**

Key Outside Consultants

(Optional: Maximum 1000 characters allowed)

3
1 **Subcontractor #1 Name**
Please provide name of Subcontractor.

(Optional: Maximum 1000 characters allowed)

3
2 **Subcontractor #1 Address**
Please provide address of Subcontractor.

(Optional: Maximum 1000 characters allowed)

3
3 **Specialty/Role with this Project**
Provide Subcontractors Specialty/Role with this Project.

(Optional: Maximum 1000 characters allowed)

3
4 **Worked with Lead Firm Before?**
Worked with Lead Firm Before?
 Yes No
(Optional: Check only one)

3
5 **Year Firm Established**
Year Firm Established

(Optional: Numbers only)

3
6 **Years of Experience**
Please provide number of years experience providing this service.

(Optional: Numbers only)

3
7 **Subcontractor #2 Name**
Please provide name of subcontractor #2.

(Optional: Maximum 1000 characters allowed)

3
8 **Subcontractor #2 Address**
Please provide address of subcontractor #2

(Optional: Maximum 1000 characters allowed)

39 **Specialty/Role with this Project**
Please provide subcontractors specialty/role with this project

(Optional: Maximum 1000 characters allowed)

40 **Worked with Lead Firm Before?**
Has this Subcontractor worked with the lead firm before?
 Yes No
(Optional: Check only one)

41 **Year Firm Established**
Please provide year Subcontractors firm was established.

(Optional: Numbers only)

42 **Years of Experience**
Please provide subcontractors number of years of experience.

(Optional: Numbers only)

43 **Resume of Key Personnel**

Resume of Key Personnel

(Optional: Maximum 1000 characters allowed)

44 **Name of Key Personnel**
Provide name of key persons, specialists, or certified staff that shall be assigned to the District's project.

(Optional: Maximum 1000 characters allowed)

45 **Title of Key Personnel**
Provide job title of key personnel assigned to District's project.

(Optional: Maximum 1000 characters allowed)

46 Assignment
Experience of Key Personnel: Provide previous or current assignment of key personnel related to this service.

(Optional: Maximum 4000 characters allowed)

47 Name of Firm with which Associated
Experience of Key Personnel: Provide name of firm which assignment was/is associated with.

(Optional: Maximum 4000 characters allowed)

48 Years of Experience with this Firm
Please provide assigned key personnel's experience with this firm.

(Optional: Numbers only)

49 Years of Experience with Other Firms
Please provide assigned key personnel's experience with other firms.

(Optional: Numbers only)

50 Education
Degree(s) or Certification(s)/Year/Specialization

(Optional: Maximum 4000 characters allowed)

51 Current Registration(s)
Please provide current registration(s)

(Optional: Maximum 4000 characters allowed)

5
2

Other Experience & Qualifications

Please provide other Experience & Qualifications relevant to the proposed project

(Optional: Maximum 4000 characters allowed)

5
3

Project Narrative

Use this space to provide a detailed project approach OR upload a response in the response attachments section.

Including but not limited to:

- Schedule and detailed approach is reasonable/responsive to District’s needs
- Describe Services offered
- Identify any and all proven techniques used
- Roles of all involved parties clearly identified
- Familiarity with project location as evidenced by proposal/interview (if applicable)
- Identify/recognize critical or unique issues specific to the project and unique approaches used elsewhere
- Proposed timeline for implementation of contract
- Proposed communication process

(Required: Maximum 4000 characters allowed)

5
4

PROPOSAL SCORING CRITERIA

PROPOSAL SCORING CRITERIA

5 Evidence of Experience & References with Similar Accounts (Ref & Exp)

5 Evaluation Criteria

Evidence of Experience & References with Similar Accounts (Ref & Exp)

Consider experience and references listed by the firm/provider. Is the firm/provider experienced in providing services similar to that requested in this RFP?

- Familiarity and experience with similar projects.
- Consider the number of years of experience the firm/provider has.
- Consider the number of years the firm has been in business.
- Consider the references given by the firm/provider.

5 Applicable Resources (Personnel Qualifications)

6 Evaluation Criteria

Applicable Resources (Personnel Qualifications)

Evaluate the extent of applicable resources available to the provider to execute the contract.

- Adequacy of proposed number of staff for the district's need.
- Consider experience of person(s) assigned to service the district's contract.
- Consider the qualifications of the staff proposed.

5 Approach and Understanding of Scope

7 Evaluation Criteria

Approach and Understanding of Scope

Evaluate the provider's approach to and understanding of the scope of services required in the RFP as evidenced by the vendor's proposal:

- Detailed approach is reasonable /responsive to District's needs.
- Familiarity with project locations as evidenced by proposal.
- Identify/recognize critical or unique issues specific to the project.
- Unique approaches that have been successful elsewhere.
- Provide literature outlining plan for implementation and training.

58	Cost Evaluation Criteria Cost Determination of cost and pricing data: - Consider the amount of time estimated for supplying staff and the fees associated with it. - Consider whether all elements of pricing conform to the requirements of the RFP. - Consider the variety of staffing offered.
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59	How many years has your company been in business? <input type="text"/> <i>(Required: Numbers only)</i>
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60	References List multiple references and prior experience; preferably with other school districts or governmental agencies, in the last 3 – 5 year period; work or services in the same type and size to the project being proposed. Please list the following information for each school district:
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61	Reference 1 Reference 1
-----------	--

62	Reference #1 Contact Person's Name <hr/> <hr/> <hr/> <i>(Required: Maximum 1000 characters allowed)</i>
-----------	--

63	Reference #1 - Contact Person's School District/Business <hr/> <hr/> <hr/> <i>(Required: Maximum 1000 characters allowed)</i>
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64	Reference #1 Address Enter Street address, city, state, zip code <hr/> <hr/> <hr/> <i>(Required: Maximum 1000 characters allowed)</i>
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65	Reference #1 Phone Number <input type="text"/> (____) _____ - _____ ext: <input type="text"/> <i>(Required)</i>
-----------	--

6 6	Reference #1 Email <input style="width: 450px; height: 20px;" type="text"/> <i>(Required: Email address)</i>
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6 7	Reference #1: Description of services performed and completion date Describe the services performed and completion date of project. <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <i>(Required: Maximum 4000 characters allowed)</i>
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6 8	Reference 2 Reference 2
----------------	--

6 9	Reference #2 - Contact Person's Name <hr/> <hr/> <hr/> <i>(Required: Maximum 1000 characters allowed)</i>
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7 0	Reference #2 - Contact Person's School District/Business <hr/> <hr/> <hr/> <i>(Required: Maximum 1000 characters allowed)</i>
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7 1	Reference #2 Address: Street, City, State, Zip Code <hr/> <hr/> <hr/> <i>(Required: Maximum 1000 characters allowed)</i>
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7 2	Reference #2 Phone Number <input style="width: 250px; height: 20px;" type="text"/> (____) ____ - ____ ext: <input style="width: 100px; height: 20px;" type="text"/> <i>(Required)</i>
----------------	--

7 3	Reference #2 Email <input style="width: 450px; height: 20px;" type="text"/> <i>(Required: Email address)</i>
----------------	---

**7
4** **Reference #2: Description of services performed and completion date**
Describe the services performed and completion date of project.

(Required: Maximum 4000 characters allowed)

**7
5** **Reference #3**
Reference #3

**7
6** **Reference #3 Contact Person's Name**

(Required: Maximum 1000 characters allowed)

**7
7** **Reference #3 - Contact Person's School District/Business**

(Required: Maximum 1000 characters allowed)

**7
8** **Reference #3 Address: Street, City, State, Zip Code**

(Required: Maximum 1000 characters allowed)

**7
9** **Reference #3 Phone Number**

() - ext:

(Required)

**8
0** **Reference #3 Email**

(Required: Email address)

**8
1** **Reference #3: Description of services performed and completion date**
Describe the services performed and completion date of project.

(Required: Maximum 4000 characters allowed)

8
2 **Additional References**

Additional reference information can be submitted as document. The document can be uploaded to the "Response Attachments" tab within the bid event.

Be sure to include the following information:

- Reference Contact Name
- Reference contact's school district/business
- Reference address (street, city, state, zip)
- Reference phone number
- Reference email address
- Description of services performed and completion date

Bid Lines

1 E-Rate Consulting Services

Price: \$ Total: \$

Supplier Notes: _____

- No bid
- Additional notes
(Attach separate sheet)

Supplier Information

Company Name:

Contact Name:

Address:

Phone:

Fax:

Email:

Supplier Notes

By submitting your response, you certify that you are authorized to represent and bind your company.

Print Name

Signature