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OETC-21I-StudentDeviceManagement

Invitation to bid to provide volume price agreement and fulfillment of: Software as a service to track and maintain student devices in a K12 environment

A Joint Cooperative Procurement by the public K-12 and Higher Education members of the Organization for Educational Technology and Curriculum (OETC).

Proposal Submission Deadline:

Due Date: June 30, 2021
2:00 p.m. PST

Electronic Submission

Submit electronically via oetc.org/bid-submit. All required documentation must be submitted through the website not later than 2:00 p.m. on the Due Date identified above. Late bids shall be rejected.

Hard Copy Submission

No hardcopy submittals will be accepted.

Section I: ITB Overview

1. **Introduction.** The Organization for Educational Technology and Curriculum (OETC), with its principal place of business at 471 High Street SE, Suite 10, Salem, Oregon 97301, on behalf of its public member K-20 institutions is seeking proposals from Computer, Storage, Networking and Accessories providers in education (Proposer) for a price agreement and fulfillment services.
2. **ITB Details.** See table below.

Solicitation Number	OETC-21I-StudentDeviceManagement
Product Class	Software as a service to track and maintain student devices in a K12 environment
OETC Contract Administrator	Thomas Richards thomas@oetc.org
Announcement URL	oetc.org/2021/06/student-device-management-itb
Administrative Fee	5%
Contract Term	Three (3) years
Contract Renewal Term	Up to three (3) additional years
Shipping Charges	Freight on Board Destination (FOB) <i>if applicable</i>
Estimated Fulfillment Volume	\$45,000 annually

3. **Critical ITB Dates and Times.** See table below

June 15, 2021	ITB is released
June 22, 2021	Questions Period <i>All questions from Manufacturers or their Authorized Dealer(s) must be submitted to OETC using the web form found at the ITB Announcement URL</i>
June 23, 2021	Posted Answers <i>All questions and official responses will be posted on OETC's website at the ITB Announcement URL</i>
June 30, 2021	Closing <i>All sealed bids are due to OETC by 2:00 p.m. on this date to qualify for evaluation</i>
June 30, 2021	Bid Opening <i>Received proposals are opened, recorded, and published at the RFP Announcement URL</i>
July 5, 2021	Response Evaluation Period <i>The evaluation period is an estimate, and may be longer or shorter based on the number of responses and/or the complexities of the bids. Significant changes to this schedule will be posted at the ITB Announcement URL.</i>
July 6, 2021	Intent to Award <i>OETC will post its intent to award at the Announcement URL.</i>
7 days	Protest Period <i>Responsive bidders not awarded may protest in accordance with the terms and conditions set forth in this ITB.</i>
July 13, 2021	Notification of Award <i>All Proposers will be notified of the status of their bid.</i>

4. **Summary of Work and Objective.**

- a. The objective of this ITB is to establish a volume Master Price Agreement(s) with Contractor(s) who are able to provide specific Software designed to track and maintain student devices in a K12 environment so that OETC Members may order product(s) appropriate for their needs.
- b. Additionally the OETC Membership seeks to obtain greater volume-based price discounts resulting from the administrative savings that the Contractor(s) will accrue from the maintenance of a single, comprehensive Master Price Agreement for thousands of organizations throughout the Pacific Northwest and beyond.

- c. All OETC Members may use the resulting Contract. This ITB may result in multiple award(s).
5. **Contract Requirements.** The successful Bidder(s) will be required to enter into a Contract with OETC per Appendix A - Sample Contract.
6. **About OETC.**
 - a. OETC is a nonprofit that makes purchasing technology simple, reliable and affordable to meet the needs of education. Our consortium membership is concentrated in the Pacific Northwest, but includes institutions in K-12 and Higher Education from every region of the United States—rural and central, large and small, old and new.
 - b. On behalf of the public consortium members, OETC negotiates competitively bid contracts with some of the best manufacturers and resellers in the educational technology industry. These contract holders gain access to a purchasing market of 1,000 educational institutions, as well as convenient and reliable sales facilitated by our dedicated marketing and support staff.
7. **Participating Members.** This RFP is on behalf of all public members of OETC. All members are accredited educational institutions serving K-12 and Higher Education students. A complete and current list of OETC Members may be found at store.oetc.org/membership.

Section II: Instruction to Proposers

1. **Complete Bids.** Failure to submit bids in accordance with the provisions of this ITB shall be grounds to declare the bid as non-responsive and the bid will receive no further evaluation or consideration.
2. **Complete All Attachments.**
 - a. **Attachment A - Bidder Information** (.xls/xlsx).
 - i. **Contract Coordinator** (*Required*). This should contain the Proposer's main contact for all Contract and RFP related questions and notifications
 - ii. **Administrative Fee** (*Required*). Contact to receive administrative fee notifications and provide administrative documentation (see Appendix for Administrative Fee collection template)
 - iii. **Product & Price Updates, Marketing, Sales and Support, Remit/To Payment Contacts** (*Optional*). Additional contacts can aid in OETC's marketing and service efforts.
 - b. **Attachment B - References** (.xls/xlsx). Submit three (3) to five (5) examples of current OETC Members that have or are currently receiving similar products and services to those proposed by the Respondent for this solicitation. In the event Respondent does not have current OETC Members as reference, please provide other educational references.
 - c. **Attachment C - Terms, Conditions, and Specification Exceptions** (.xls/xlsx). *See §V ITB Terms and Conditions, paragraph 14: Solicitation Protest; Request for Change; Request for Clarification for directions on completing this Attachment.*
 - d. **Attachment D - Authorized by Manufacturer** (*not provided*). If Respondent is not the Manufacturer of the goods or services in the Bid, Respondent must attach a Manufacturer's authorization letter or other written evidence/documentation. The letter must specify the territory Responder is authorized for and specifically reference the OETC ITB opportunity.
3. **Complete All Exhibits.** Exhibits will be incorporated into the contract resulting from an award under this ITB.
 - a. **Exhibit 1 – Pricing** (.xls/xlsx).
 - i. All pricing shall include the OETC administrative Fee.
 - ii. Pricing shall be all inclusive.
 - iii. Pricing shall be based on the size of the district as measured by Average Daily Membership ("ADM") as reported by the OETC member
 - iv. Respondent shall fill out the "Manufacturer", "SKU" and "OETC Member Price" columns.
 - v. Implementation services can also be bid, but will not affect the scoring

- b. **Exhibit 2 - Resellers** (.xls/xlsx). Respondents may designate themselves or separate Resellers to fulfil the terms and conditions of the contract. Final selection of designated Resellers will be made in consultation with OETC.
- c. **Exhibit 3 - EDGAR Certification** (.doc/docx. *Not required*). Under the Code of Federal Regulations, all federal government funds must be spent with vendors who meet the EDGAR certifications. Completed EDGAR certifications allows OETC members to use federal funds (if available) to purchase off of the awarded contract.
- d. **Exhibit 4 - VPAT - Section 508 Compliance** (*Not required. Not provided*). If Respondent is a software provider, Respondent should describe their commitment to the development of accessible products by describing their support of the applicable provisions of the Workforce Investment Act of 1998, Section 508. More information can be found here: <https://www.itic.org/policy/accessibility/vpat>

Section III. Software designed to track and maintain student devices in a K12 environment Specifications

Refer to Exhibit 1 - Pricing for all Software designed to track and maintain student devices in a K12 environment specification.

Requirements

Required (Y/N)	Specification
Y	Software as a service. Software requires no on premise installation, and wholly managed by the provider.
Y	Asset Management. Must manage an unlimited number of assets
Y	Student assignment. Association of a device to a student in the district via SIS integration.
Y	Incident Repair. Create an incident ticket. Track incident ticket status
Y	Reporting. Reports based on assignments, devices and incidents.
Y	Workflows. Software workflows based on K12 best practices
Y	Google Integration. Must be able to sync devices from District's Google admin console and manage district's organizational units from inside the proposed solution.
	SIS Integrations.
Y	- Infinite Campus
Y	- One Roster
Y	- PowerSchool
Y	- ProgressBook
Y	- Skyward
Y	- Powerschool

Section IV: ITB Evaluation

Phase 1.	
Responsive Bid	Pass / Fail
Responsible Bidder	Pass / Fail
Terms and Conditions	Pass / Fail
Phase 2.	
Pricing	Lowest price from complete and responsive bids

1. **Phase 1 – Review and select responsive and responsible bids.** All bids will be evaluated to determine if they are responsive and responsible. The purpose of this phase is to determine if each bid complies with the mandatory terms, conditions, and specifications in this ITB. A pass or fail criteria will be used.
 - a. **Responsive Bid.** A responsive bid is complete and on time.
 - b. **Responsible Bidder.** A responsible bidder is qualified to sell the proposed products in the education industry and in the OETC membership geographic area.
 - c. **Terms and Conditions.** Any bid that requests changes to this ITB’s terms and conditions or the terms and conditions of the Sample Contract (Appendix A) may constitute a fail designation for this phase. OETC reserves the right to conditionally pass a respondent on this section, but to negotiate any proposed changes to the terms and conditions..

2. **Phase 2 – Evaluate Pricing.** Only those bids found to be complete and responsive under Phase 1 will be considered in Phase 2.
 - a. OETC may request clarification from one or more bidders. Responses to clarifications must be made in writing. OETC will only use what is in writing for evaluation purposes. The response to the request for clarification may be considered along with the original bid for the evaluation.
 - b. OETC reserves the right to make an award without further clarification of the bids received. Therefore, it is important that each bid be submitted in the most complete manner possible.
 - c. Of all the bids that pass Phase 1, only the lowest priced bid for a given manufacturer line or category will be awarded a contract.

Section V: ITB Terms and Conditions

1. **Joint Cooperative Procurement.** This solicitation is a Joint Cooperative Procurement. Authorized agencies may establish a Contract with the provider to purchase the goods and services awarded by this solicitation. Authorized agencies may not materially change or alter the terms, conditions, and prices from the original Contract between the provider and the district.
2. **Brand Specification.** If items called for by this Invitation to Bid has been identified by a brand name, such identification is intended to be descriptive but not restrictive, and is to indicate the quality and characteristics of products that will be satisfactory.
3. **Estimated Fulfillment Volume Is Not a Guarantee of Sales.** The Estimated Fulfillment Volume is provided as a courtesy to Respondents to corroborate proposed pricing. The Estimated Fulfillment Volume is based on purchasing history and consortium demand.
4. **Change by Written Addenda.** OETC may change this ITB by written addenda. OETC will issue all Addenda and changes at the Solicitation Announcement URL. At its discretion, OETC may extend the closing to allow Respondents time to analyze and adjust to changes.
5. **Reservations.** OETC reserves the right to reject any and all bids, to modify these ITB specifications, or to waive informalities in the ITB.
6. **Modifications.** Modification must be prepared and submitted using the TERMS, CONDITIONS AND SPECIFICATIONS EXCEPTION FORM attached to this RFP.
7. **Withdrawal.** A Respondent may modify or withdraw its Bid in writing prior to closing.
8. **Bids are Irrevocable.** Bids submitted by Respondents shall be irrevocable for at least ninety (90) calendar days after the bid opening date and time.
9. **Controlling Language.** The Respondent hereby acknowledges and agrees that these ITB Terms and Conditions and the resulting contract terms and conditions control any contract awarded by this process unless the Respondent expressly states on Attachment C any such alternative terms or conditions..
10. **Late Bid.** Any Bid received after closing is late. A Proposer's request for withdrawal or modification of a Bid received after closing is late. OETC will not consider late Bids.
11. **Receipt, Opening and Recording Proposals.** Proposals will be opened and recorded. The number of Bids received and the identity of Respondents will be disclosed to the public at the time of opening. The content of bids will not be disclosed until all bids have been evaluated, negotiations completed if required, and an Intent to Award has been published.
12. **Preference.** If all other factors are equal, goods or services that have been manufactured or produced in Oregon will receive preference.
13. **Multiple Awards.** OETC 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 OETC from awarding a single Contract.

14. Solicitation Protest; Request for Change; Request for Clarification.

- a. **Procedure.** The appropriate means of seeking clarification or modification to provisions of an ITB are through
 - i. Request for clarification;
 - ii. Requests for changes to contractual terms or specifications
- b. Any Bid that includes non-approved alternate product brands or that takes exception to the specifications or contractual terms of the ITB may be deemed non-responsive and may be rejected.
- c. **Method of Submitting Requests For Modification of ITB Provisions.** An email must be received by the OETC Contract Administrator listed on Page 2 of the ITB, no later than seven (7) calendar days prior to the Bid Closing Date. Unless this specific deadline is extended by subsequent Addenda, no requests for substitution, requests for clarification, requests for change, or protests pertaining to provisions contained in the originally-issued ITB will be considered after the date specified herein.
- d. **Request for Clarification.** Any Bidder who finds discrepancies in, or omissions from, any provision of the ITB, Specifications, or Contract Documents, or has doubt as to the meaning, shall make a request for clarification in writing, to the OETC Contract Administrator listed on Page 2 of the ITB. To be considered, the request for clarification must be received no later than seven (7) calendar days prior to the Bid Closing Date.
- e. **Request for Changes to Contractual Terms or Specifications.** Any Bidder may submit a request for changes to contractual terms or specifications, in writing, to the OETC Contract Administrator listed on Page 2 of the ITB. To be considered, the request for clarification must be received no later than seven (7) calendar days prior to the Bid Closing Date.
 - i. The request must include the specific changes requested, and the reason for requested changes supported by factual documentation.
 - ii. The request must be made using Attachment C.

15. Requirements for Protest. Respondent may protest the Intent to Award during the protest period if:

- a. The Respondent is adversely affected because the Respondent would be eligible for Award of the Contract in the event the Protest were successful; *and*
- b. The reason for the Protest is that (the aggrieved Respondent must provide details):
 - i. All higher scoring Bids are not responsive;

- ii. OETC has failed to conduct the evaluation of Bids in accordance with the criteria or processes described in this ITB; and
- iii. OETC's evaluation of Bids or OETC's subsequent Intent to Award is otherwise in violation of the provisions of ORS 279A or 279B.

16. **Protest Process.** A Respondent may protest the procurement process or the ITB document as set forth in ORS 279B.405(2). Proposer written comments shall include:

- a. A detailed statement of the legal and factual grounds for the protest;
- b. A description of the resulting prejudice to the Respondent; and
- c. A statement of the form of relief requested or any proposed changes to the contract terms and conditions or specifications.
- d. OETC will issue a Written Disposition of the Protest in a timely manner. OETC's Executive Director has the authority to settle any protest. If the Executive Director does not settle a Protest, the OETC Board President, or designee, has the authority to resolve the Protest. If OETC upholds the Protest, in whole or in part, OETC will, in its sole discretion, either award the Contract to the successful protester or cancel the RFP.

Section VI: Bid Signature Page

The undersigned hereby agrees to the specifications, terms and conditions of this invitation to bid. Additionally the undersigned acknowledges their authority to submit this bid on behalf of the firm listed below and binds it to comply with these specifications, terms and conditions if any contract is awarded through this ITB process.

Company Information

Legal Name of the Company _____

I, the above signee, certify the pricing provided in this Response is the lowest available pricing from my firm to OETC Members.

Signature of Authorized Representative

Printed Name of Representative

Title of Representative

Date Signed

Legal Address

Address Line 1

Address Line 2

City

State

Zip