

## **US Educational Technology Purchasing Alliance Information Technology Equipment & Services**

**Request for Proposal to:**

**Provide volume price agreement and fulfillment of  
Financial/Leasing Services for IT Equipment/Services**

**Issue Date: 8:00am, December 20, 2021**

**Deadline for Questions: 4:00pm, January 3, 2022**

**Response Date 4:00pm, January 19, 2022**

**Awards Final Date 11:59pm January 24, 2022**

**USETPA RFP Contact**

**Landon Scism**

**3100 Dick Pond Rd, Ste E.**

**Myrtle Beach, SC 29588**

**[landon@usetpa.org](mailto:landon@usetpa.org)**

**(919) 391-9558**



# US Educational Technology Purchasing Alliance (USETPA)

December 20, 2021

Request for Proposals

## Notice to Proposers of Terms and Conditions

This RFP is co-authored by Lake Bluff School District 65 (IL), and the USETPA on behalf of its subscriber institutions. The USETPA and the above-mentioned public entity are not currently seeking any goods or services but are conducting this bid for the purpose of accelerating public funding and obtaining advantageous pricing. Any questions regarding the RFP must be made by email ([info@usetpa.com](mailto:info@usetpa.com)) to the USETPA. **Directly contacting any coauthored entity will result in disqualification from the bidding process.** Any questions regarding the RFP must be made by email ([info@usetpa.com](mailto:info@usetpa.com)) to the USETPA, not the sponsoring public entity.

The US Educational Technology Purchasing Alliance (USETPA) is a non-profit issuing contracts on behalf of a consortium of Subscribers (schools/school systems/libraries/Head Start Agencies/local government units/community colleges/higher educational institutions and other public entities) to obtain the best available pricing for goods/services to be purchased by the Subscribers or users of the contracts. The USETPA has Subscribers/Members and users of the contracts in multiple states. The contracts issued by the consortium are used both for securing government funding and for Convenience Contract purposes. The contracts are managed on behalf of the USETPA and its subscribers by Consortia Purchasing Advisors, LLC.

USETPA, a formally organized non-profit entity whose creation was authorized by NC G.S. 143-129(e)(3), has followed procurement procedures, competitively obtained purchasing services, for discounted products and services offered by this Agreement in accordance with NC G.S. 143-129(e)(3). USETPA is permitted to engage in cooperative purchasing pursuant to NC G.S. 143-129(e)(3).

It is the sole responsibility of each Subscriber/Member to follow state and local procurement statutes and rules as it pertains to cooperative purchasing or joint power Agreements with in-state or out-of-state public agencies. USETPA makes cooperative purchasing contracts available to Members "as is," and is under no obligation to revise the terms, conditions, scope, price, and/or any other conditions of the contract for the benefit of the Member. Members are permitted to negotiate and agree to additional terms and conditions with Vendors directly.

Each party shall be responsible for its acts and the results thereof, to the extent authorized by law, and will not be responsible for the acts of the other party and the results thereof. The Member will be responsible for all aspects of its purchase, including ordering its goods and/or services, inspecting and accepting the goods and/or services, and paying the Vendor who will have directly billed the Member placing the order. The use of each contract by the Member will adhere to the terms and conditions of the USETPA contract.

Any and all disputes which may arise between the Member and the Vendor are to be resolved between the Member and the Vendor.

This Agreement incorporates all Agreements, covenants and understandings between USETPA and the Member. No prior Agreement or understanding, verbal or otherwise, by the parties or their agents, shall be valid or enforceable unless embodied in this Agreement. This Agreement shall not be altered, changed or amended except by written amendment executed by both parties.

- 1) USETPA contracts are available to all Public and Private Pre-K-12 Schools, Libraries and Government Entities
- 2) Members/Subscribers are never charged a fee to use a USETPA Contract
- 3) Membership does not obligate the member/subscriber to use a USETPA contract
- 4) E-rate specific: Optional for all subscribers/members at their discretion

The Universal Service Fund's E-Rate program supports schools, libraries, local governments and hospitals in obtaining telecommunication, broadband services and broadband/networking equipment. Schools and libraries who have formally subscribed to the USETPA and have given the USETPA authorization to seek bids on their behalf are listed on our Form 470. A copy of the 470 may be found at [www.usac.org/sl](http://www.usac.org/sl).

While only subscriber E-Rate eligible entities will be able to reference the applicable Form 470 for E-Rate application purposes, it is the express intention of the issuing entities that the terms and conditions of this RFP will be made available for cooperative use to all schools, libraries and other public agencies for entities within and without the same states of current USETPA subscribers. In order to qualify for use under the terms and conditions of this contract, individual purchases **must be registered** with the USETPA as outlined on the USETPA website ([www.usetpa.org](http://www.usetpa.org)).

Vendors may have geographical limitations to their response. Appendix G must be completed to indicate in which states the response is to be considered valid. Vendors may further separate pricing into multiple geographic responses if there is a cause for a pricing variance. Please explain, in detail, the reasons in the RFP response.

It is also understood that state and local procurement law(s) as well as subscriber preference(s), can dictate that users of convenience contracts select firms that have distribution/licensing/registration and/or sales and service facilities located within their home state. Appendix G also requires that respondents indicate in which states a physical presence is maintained.

**Co-authored by the US Educational Technology Purchasing Alliance.** (Any questions regarding the RFP must be made by email ([info@usetpa.com](mailto:info@usetpa.com)) to the USETPA; directly as contacting any listed public entity or school districts will result in disqualification from the bidding process). We are seeking qualified Vendor(s) to supply the following:

#### Categories List:

#### Category 1 (One): Leasing/Financial Services for IT purchases by:

- 1 Any public entity, including Pre-K – 12 schools, Local Governments, Local Government entities.
  - a. Subcategories (designated by the Proposer)
- 2 Private K-12 educational entities
  - a. Subcategories (designated by the Proposer)
- 3 Non-profit K-12 entities
  - a. Subcategories (designated by the Proposer)

for an indefinite quantity contract, for Convenience/Term and E-Rate (if applicable) Purchases. Vendors may subdivide the Categories for pricing discounts. **Vendors may specify different discount level(s) for volume purchase(s) or offer volume purchase discounts to USETPA and/or USETPA Subscribers at any time through this RFP during the contract period. All pricing discounts are made on a 'to not exceed' basis meaning that vendors may elect to offer prices lower than those stated in their bid, but not higher.**

The purpose of this document is to provide general and specific information for use by Vendor(s) in submitting a proposal to supply the USETPA with information technology goods and services as listed above in accordance with N.C.G.S. 143-1 29.8. The USETPA intends to award an indefinite quantity contract for a five-year term, with the option of an extension in and equal term as a result of this RFP. We will select qualified Vendor(s) with whom we will develop a mutually beneficial contractual relationship. Our decision to award will be based on an evaluation of the proposal that offers the best overall benefit to the USETPA for pricing, maintenance and support, and any value-added services. Multiple vendors may be given contracts for the same products/services.

You are being asked to submit a proposal in a **sealed** envelope at this time in accordance with the attached specifications and within the terms and conditions herein set forth, as well as an electronic version of the same proposal.



USETPA RFP Number: 2112001

**Delivery Address for delivery service sealed bid submission, otherwise please call/email the USETPA to arrange a personal delivery time and address:**

**USETPA**

**Attn: Senior Contract Administrator, Vendor RFP (Vendor Name)**

**3100 Dick Pond Rd, Ste E**

**Myrtle Beach, SC 29588**

All certified financial entities are encouraged to submit bids, even if only a selection of the financial services are bid as long as this is specified on the bid page. Do not list items if you are not submitting bids on those items.

For this solicitation the US Educational Technology Purchasing Alliance, will allow all schools, all libraries, and all local governments and any other public agencies as well as K-12 private entities to purchase under the terms and conditions of the contract established with the selected vendor under the provisions of N.C.G.S. 143-129(e)(3).

## **US Educational Technology Purchasing Alliance Request for Proposals**

### **I. SCOPE**

#### **1.1 REQUIREMENT**

The USETPA is soliciting proposals from qualified companies to enter into a Master Agreement for Technology Equipment/Services including but not limited to those specifically mentioned in this RFP. The RFP is subject to USETPA General Conditions and Instructions to Proposers and Special Provisions (Ref. Paragraph 2).

The Vendor(s) must deal directly with any USETPA Subscriber (herein "Participating USETPA Subscriber") concerning product/service orders, credit applications, purchase and lease documents, collection disputes, invoicing, and payment. USETPA or its Subscribers shall not be held liable for any costs, damages, etc., incurred by any Participating USETPA Subscriber.

This Master Convenience Contract is a result of this Request for Proposal dated December 20, 2021 and shall be construed to be in accordance with and governed by the laws of the State of North Carolina.

Each Participating USETPA Subscriber enters into the Master Convenience Contract that allows the Participating USETPA Subscriber to purchase/finance products and services from the Vendor(s) in accordance with each participating USETPA Subscriber's purchasing policies and procedures.

#### **1.2 SCOPE OF PRODUCTS AND SERVICES**

Responder should include and state all services provided and include a blank copy of any and all contracts that must be included in the response by the participating entity.

#### **1.3 DEFINITIONS**

##### **Contracted Financial Services Provider**

1. The original Financial Services Provider awarded the contract to directly provide the products and services solicited in this document or
2. The holder of a re-labeling agreement authorized by the original Financial Services Provider/Manufacturer to provide sales and support of the products, directly or through certified sub-contractors which must be listed, including all contact information.

## **US Educational Technology Purchasing Alliance RFP- Request For Proposal**

### **1.4 RESPONDER RESPONSIBILITIES**

For the purposes of this type of contract the responder should identify itself as one of the following:

1. The original Manufacturer providing direct support of the products/services in full compliance with all terms and conditions of this contract.
2. The original Financial Services Provider choosing to designate authorized distribution/channel partners certified to provide support of the product(s) in full compliance with all terms and conditions of this contract.
3. A third party authorized by the original Manufacturer/Financial Services Provider to provide support of the product(s), directly or through certified sub-contractors in full compliance with all terms and conditions of this contract.
4. Holders of re-labeling agreements authorized by the original Manufacturer/Financial Services Provider to provide sales and support of the products, directly or through certified sub-contractors in full compliance with all terms and conditions of this contract.
5. A reseller of distributor of authorized original Manufacturer/Financial Services Provider products.

The responder **must quote a minimum discount percentage** for each category or subcategory. USETPA reserves the right to delete any items offered and deemed, at the sole discretion of USETPA, to be outside of the intended scope of this RFP.

The responder should submit with the proposal, a copy of the most recent Manufacturer/Financial Services published price list/catalog and the price list if available. In the event that the published price list/catalog does not exist, a signed and notarized typed listing of retail prices and minimum discounts of all categories (itemized if necessary) offered in the RFP response should be submitted. Such price list/catalogs shall be for informational purposes only, terms and conditions contained therein are not applicable to this agreement. This price list and discount shall be updated as prices/discounts are changed or discontinued/added.

All documentation requested in the invitation to RFP should be submitted with the RFP response. Any documentation, verification or clarification requested during the evaluation must be provided by the date required in the request for additional information. Failure to provide the requested information in the time allowed may result in the rejection of the bid response

Responder **MUST** provide proof of financial stability include the proof letter with their bid response

- 1) The Proof MUST be on the appropriate letterhead stationery, and provided by the account executive responsible for the authorization, dated and signed.
- 2) Responder must notify USETPA and all current/future clients immediately of any change in the authorization.

Each Responder must provide the Name of Financial Services Company or branch office(s), Location(s) and Function(s) of the offices that will provide administrative support in the successful execution of this contract, including all contact information including:

1. complete name
2. physical location (complete address)
3. phone number including the extension if necessary
4. email address.

Each responder must provide a list of authorized partners/branch offices and the contact(s) information responsible for maintaining this list.

### 1.5 CALENDAR OF EVENTS

**Issue Date: 8:00am, December 20, 2021**

**Deadline to receive Inquiries: 4:00pm, January 3, 2022**

**Potential Reseller Q&A Session (Attendance not required): December 29, 2021**

(04:00pm, 1340 Environ Way, Chapel Hill, NC 27517, Advance notice of attendance required no later than **4:00pm, December 28, 2021**)

**Request for Proposal Deadline: 4:00pm, January 19, 2022** (Any RFP submissions received after 4:00pm will not be considered)

**Awards Announcement, Final: 1:59pm January 24, 2022** (posted online at [www.usetpa.org](http://www.usetpa.org))

### 1.6 RESPONDER INQUIRIES

No negotiations, decisions, or actions shall be executed by any responder as a result of any oral discussions with any USETPA/ USETPA Subscriber Employee, or USETPA Consultant. Only those transactions, which are in writing, issued and an Addendum and/ or Informational Notice from USETPA Purchasing may be considered as valid. Likewise, USETPA shall only consider communications from responders which are signed and on company letterhead and/or submitted and an attachment via email. USETPA will accept inquiries via mail, certified mail, email or fax and telephone as indicated in the RFP.

### 1.7 SIGNATURE AUTHORITY

The person signing the response must:

1. Be a current corporate officer, partnership Subscriber or other individuals specifically authorized to submit a bid as reflected in the appropriate records on file with the Secretary of State; or:
2. Be an individual authorized to bind the vendor as reflected by a corporate resolution, certificate or affidavit: or

3. Submit other documents indicating authority which are acceptable to the public entity.

## 1.8 SIGNATURE

At least one copy of the RFP shall be signed in original ink by the authorized employee, agent, or representative of the bidder (see 1.7 above).

## 1.9 NUMBERS OF COPIES OF RESPONSE

One (1) paper Bidder authorized, original signature RFP, response is required. One (1) additional electronic copy of the RFP response is also required. The Digital copy may be on CD or flash drive or digitally emailed to [landon@usetpa.org](mailto:landon@usetpa.org). One (1) watermarked, draft proposed contract with USETPA must be included with the response if different from the attached Appendix C.

## 1.10 DELIVERY OF RESPONSES

Responder is solely responsible for ensuring that its courier service provider makes inside deliveries to the USETPA physical location. USETPA is not responsible for any delays caused by the responder's chosen means of delivery.

Responder is solely responsible for the timely delivery of its RFP. Failure to meet the RFP opening and deadline shall result in the rejection of the RFP.

**ALL RESPONSES TO RFP REQUEST BECOME A MATTER OF PUBLIC RECORD AT THAT TIME. BY SUBMITTING AN RFP, RESPONDER SPECIFICALLY ASSUMES ANY AND ALL RISKS AND LIABILITY ASSOCIATED WITH INFORMATION MARKED CONFIDENTIAL IN THE RFP AND THE RELEASE OF ANY INFORMATION.**

## 1.11 NON-EXCLUSIVE CONTRACT

This contract is non-exclusive and shall not in any way preclude the USETPA/ USETPA Subscriber from entering into any similar contracts and/or arrangements with other vendors or from acquiring similar equal or like goods and/or service from other entities or sources.

## 1.12 CHANGES, ADDENDA, WITHDRAWALS OF RFP RESPONSE

If the responder needs to submit changes or addenda, such shall be submitted in writing, signed in original ink by an official representative of the responder, cross-referenced clearly to the relevant bid section, in a sealed envelope, prior to the RFP opening. Such shall meet all requirements for the RFP, if the responder chooses to withdraw his RFP response; the withdrawal notice shall be in writing and received prior to the RFP opening.

## 1.13 COOPERATIVE PURCHASE

## **US EDUCATIONAL TECHNOLOGY PURCHASING ALLIANCE**

The US Educational Technology Purchasing Alliance (USETPA), in accordance with North Carolina General Statute 143-129 e(3), operates a “competitive bidding group purchasing program, which is a formally organized program that offers competitively obtained purchasing services at discount prices to two or more public agencies”.

Contracts are issued on behalf of USETPA subscribers but are issued with the express intent to allow for cooperative purchasing and/or piggybacking as allowed by individual state law. To ensure compliance with the terms and conditions of USETPA contracts, all procurement based on a USETPA contract is required to be registered on the USETPA website at [www.usetpa.org](http://www.usetpa.org) including copies of all quote(s) ([quotes@usetpa.com](mailto:quotes@usetpa.com)) and purchase order(s) [po@usetpa.com](mailto:po@usetpa.com) issued, by the client or reseller, sent to the USETPA at the listed email addresses.

#### **1.14 SUBSCRIBER STATUS IN USETPA PURCHASING GROUP**

Participation in the US Educational Technology Purchasing Alliance is open to all PreK-12 schools, LEAs, Libraries, Head Start organizations, state and local government agencies, community colleges, higher education institutions, and other public agencies, non-profits and PreK-12 educational institutions.

These objectives do not preempt Participating Subscribers/Members from using other contract vehicles or competitive processes as required by law.

#### **1.15 INVOICE**

Invoices will be submitted by the Contractor upon presentation of properly executed invoice. Invoices will be paid within 30 days of receipt of properly executed invoice, or receipt of goods, whichever is later.

#### **1.16 CONTRACT PERIOD**

The USETPA intends to award an indefinite quantity contract for a five-year term, with the option of one additional five (5) year extension, as a result of this RFP. We will select a qualified Vendor(s) with whom we will develop a mutually beneficial contractual relationship. Our decision to award will be based on an evaluation of the proposal that offers the best overall benefit to the USETPA for pricing, maintenance and support, and any value-added services.

#### **1.17 RENEWAL**

At the option of the USETPA and acceptance of the contractor(s), this contract may be extended for one (1) additional five (5) year period with the same terms, conditions and discount (or greater) structure.

#### **1.18 MULTI VENDOR AWARD**

USETPA contracts may be awarded to multiple Financial Service Entities. Awards will be based upon respondents meeting a minimum score on the USETPA bid-scoring matrix.

### 1.19 AWARD EVALUATION CRITERIA

It is the intention of the USETPA to award this contract all-or-none to the responsive and responsible responder, meeting the requirements of the RFP specifications and offering the overall greatest discount percentages for each category. The discount percentage quoted by the Contractor shall establish the minimum level of reduced pricing offered to the USETPA in each of the categories from the manufacturer's most recent published price list catalog or on the notarized typed listing of retail prices. The discount shall apply to any updated items or new items added throughout the life of the new contract, in accordance with the specification requirements.

Net prices may not exceed the current advertised price. If not, the USETPA does not intend to award or to maintain any item in any group that is offered at a price equal to or above the Financial Services Provider List Price. **A link to or typed list (spreadsheet) of the current advertised price must be provided.**

An award may be made to all responsive and responsible submissions to the USETPA's request for competitive fixed price bidding. However, not every representative of a Financial line of service may be awarded a contract.

### 1.20 USETPA FEES

In order to maintain and enhance the quality and quantity of USETPA contracts, all vendors agree to pay a 1.0-1.75% fee of all equipment purchases made by the Subscribers to the Consortia Purchasing Advisors, LLC for expenses related to the maintenance and management of the USETPA. This 1.0-1.75% fee is not to be included in the pricing structure submitted for the bid. USETPA Subscribers/Users may not be charged this fee in any manner.

### 1.23 CATEGORIES OF PRODUCTS (Detail)

#### Details:

#### Category 1 (One): Financial Services:

Bidders should list pricing, discounted unit pricing and minimum percentage discount from list price by group. Bidders may add other related items (equipment, software, licenses, services) that enhance/augment the primary commodities, but must be distinguished from the primary bid and so noted in the submitted bid, and provide list pricing, discounted unit pricing and percentage discount from list price.

Vendor may additionally provide volume discounts provided the minimum quantity to qualify is provided along with list pricing, discounted unit pricing and percentage discount from list price by group. Lower volume discount pricing may be offered at any time to USETPA and/or USETPA Subscribers per this RFP and any resulting contract(s).

## II. GENERAL TERMS AND CONDITIONS

**1.1 Award:** Any contract resulting from this Request for Proposals shall be awarded to the Vendor(s) that submits the best overall proposal as determined by the USETPA in accordance with N.C.G.S. 143-129.8. The USETPA may negotiate with any Vendor(s) in order to obtain a final contract that best meets the needs of the USETPA.

**1.2 Questions:** Any questions from prospective Vendor(s) concerning the RFP response must be sent by email to [info@usetpa.com](mailto:info@usetpa.com) and are referred to Mr. Landon Scism, (910) 377-1234, [landon@usetpa.org](mailto:landon@usetpa.org). A public Q&A session will be held **4:00pm, January 3, 2022** (04:00pm, 1340 Environ Way, Chapel Hill, NC 27517, Advance notice of attendance required no later than February 08, 2021) Attendance is voluntary and not required to submit a bid. All questions and answers will be posted to the USETPA website no later January 6, 2022.

**1.3 Documentation:** All documentation submitted by Vendor(s) is voluntary and becomes the property of the USETPA, who is under no obligation to return or pay for any of the material submitted by a Vendor in response to this RFP.

**1.4 Acceptance:** The USETPA reserves the right to accept or reject any or all of the proposals submitted, and to waive informalities and accept that proposal which appears to be in the USETPA's best interest.

**1.5 Proposal Review:** The USETPA will review and analyze each proposal, and reserves the right to select the Vendor(s) who offers the best value. The USETPA shall select the Vendor(s), which in the USETPA's opinion, has made a proposal best suited to the needs and goals of the USETPA and deemed to be in compliance with the terms of this RFP.

**1.6 Contract Transfer:** The Vendor(s) shall not assign, transfer, sublet, convey or otherwise dispose of any contract which results from this RFP or its right, title or interest therein or its power to execute the same to any other person, firm, partnership, company or corporation without the previous written consent of the USETPA. The USETPA reserves the right to declare the Vendor(s) in default and terminate the contract for cause.

**1.6.1 Contract Assignment/Transfer:** The Vendor(s) shall not assign or in any way transfer any interest in the contract without the prior written consent of the USETPA, provided, however, that the claims for money due or to become due to the Vendor(s) from the USETPA may be assigned to a bank, trust company or other financial institution without such consent so long as notice of such assignment shall be expressly made subject to all defenses, setoffs, or counterclaims which would have been available to the USETPA against the Vendor(s) in the absence of such assignment.

**1.6.2 Equipment/Services Subcontract/Transfer:** None of the equipment/services to be provided by the Vendor(s) pursuant to the contract shall be subcontracted or delegated to

any other organization, association, individual, corporation, partnership, or other such entity without the prior written consent of the USETPA. No subcontract or delegation shall relieve or discharge the Vendor(s) from any obligation or liability under the contract.

**1.7.4 USETPA** The Proposer(s) shall hold harmless the USETPA from any and all claims for damages arising out of bodily injury to or death of any person or persons, and for all claims for damages arising out of injury to or destruction of property caused by accident resulting from the use of implements, equipment or labor used in the performance of the contract or from any neglect, default or omission, or want of proper care, or misconduct on the part of the Vendor(s) or for anyone in his employ during the execution of the contract derived from this RFP.

**1.8 Sales Taxes:** Please include appropriate Sales tax or other applicable taxes, if any, as a separate line item in your proposal to the Subscriber/Member of the USETPA. Sales tax records and certified statements may be required for all materials and supplies that are purchased in the fulfillment of this project.

**1.9 Amendments:** No amendment to the contract (Appendix C) shall be effective unless it is in writing and signed by authorized representatives of both parties and is accepted by the USETPA.

**1.10 Causes Beyond Reasonable Control:** Neither party will be liable to the other or be deemed to be in breach of the contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include, but are not limited to, acts of God or the public enemy, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes and unusually severe weather. Dates or times of performance will be extended to the extent of delays excused in this section, provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay.

**1.11 Outside Contract Fees:** The Vendor(s) represents that no other person other than the bonafide employees working solely for the Vendor(s) have been employed or retained to solicit or secure this agreement upon an arrangement or understanding for a commission, percentage, brokerage fee, gift or any other consideration contingent upon the award for making of this contract. For breach or violation of the representation, the contract price, consideration, or otherwise, the USETPA may recover the full amount of such commission, percentage, brokerage fee or other consideration.

**1.12 Product Delivery:** Unless otherwise stated, all items shall be quoted and delivered F.O.B. destination (i.e. at a specific USETPA Subscriber address), and delivery cost and charges (if any) shall be included in bid price.

**1.13 Contract Duration:** Any contract which results from this Request for Proposal shall be for the duration of the proposal, contingent upon USETPA satisfaction and Vendor(s) adherence to Terms and Conditions. Purchase Orders issued by the USETPA Subscriber shall serve as the USETPA Subscriber's only commitment to purchase. The contract resulting from this RFP may be used as a Convenience Contract (with the exception of E-Rate Pricing) available for

use by any current or future USETPA Subscribers at any time during the term of the contract. All purchase orders shall reference this Agreement.

**1.14 Contract Situs:** The place of this contract, its situs and forum, shall be Brunswick County, North Carolina, where all matters, whether sounding in contract or tort, relating to its validity, construction, interpretation and enforcement shall be determined.

**1.16 Delivery:** Delivery of products/services shall be completed within 30 days from the date of the original Purchase Order, unless agreed to by the USETPA Subscriber. Purchase Orders may be cancelled by the USETPA Subscriber, in writing, with no penalty or expenses to the USETPA Subscriber if the order is not delivered by the Vendor within 30 days from the original order, or additional time limit as agreed to by the USETPA Subscriber.

## Part 2: Submission of Proposals

**One original signed** copy of the proposal must be submitted in a sealed package. **One electronic copy** may be included in the package or emailed to [reports.manager@usetpa.com](mailto:reports.manager@usetpa.com). Include appropriate documentation in the email so the email/file may be correctly identified. The original paper package should be addressed as follows:

### USETPA

**Attn: Senior Contract Administrator, Vendor RFP (Vendor Name)**  
**3100 Dick Pond Rd, Ste E**  
**Myrtle Beach, SC 29588**

## Part 3: RFP Evaluation

**3.1 Award(s) will be based on the lowest and best bid (most advantageous to USETPA Subscribers) as determined by consideration of:**

1. Prices offered: 30%
2. Quality of item(s) offered and suitability for intended use: 20%
3. General Reputation and performance capabilities of vendor: 20%
4. Conformity with specifications herein: 20%
5. M/WBE participation: 10%

**3.2** The USETPA will perform a full and complete evaluation of all submittals. The Senior Contract Administrator (SCA) will be responsible for all final decisions on behalf of the USETPA and its subscribers.

**3.3** Recommendation for award will be based upon the most advantageous proposal(s) received considering product pricing discounts, maintenance pricing discounts, and any and all other value-added services proposed by the Vendor to the USETPA.

3.4 Value-added services will be given special consideration by the USETPA.

## INTRODUCTION TO RFP REQUIREMENTS

### A. GENERAL CONSIDERATIONS

Costs for developing responses to this RFP are entirely the obligation of the Vendor(s) and shall not be chargeable in any manner to the USETPA. Submission of a sealed response to the RFP will signify the Vendor's agreement that their response and the contents thereof are valid for 90 days.

The USETPA reserves the right to negotiate with any Vendor(s) in order to obtain a final contract that best meets the need of the USETPA/Subscriber. Additionally, the USETPA reserves the right to reject any and all RFP responses if it is determined to be in the best interests of the USETPA to do so.

Responses received after the due date and time specified in this RFP will not be considered.

Winning Vendor(s) must agree to provide a complete searchable electronic price list with discounts in Excel format to USETPA within five (5) business days, if not included with the original bid, and may be emailed to [landon@usetpa.org](mailto:landon@usetpa.org)

Proposed Vendor contracts that differ from the Appendix C must be noted and must be included with the written response to this RFP.

### B. EVALUATION CRITERIA

The USETPA will evaluate all properly submitted responses.

The following general criteria will be used to evaluate the responses:

1. Prices offered: 30%
2. Quality of item(s) offered and suitability for intended use: 20%
3. General Reputation and performance capabilities of vendor: 20%
4. Conformity with specifications herein: 20%
5. M/WBE status: 10%

USETPA Subscribers reserve the right to reject any bid on the basis of function, compatibility with user requirements of utility as well as costs.

### C. FORMAT FOR RESPONSE TO RFP

This section serves as a checklist for the expected format of the Vendors' response to the RFP. Any supporting documentation should be included in an appendix or attachment.

All appropriate Appendices must be completed and attached.

The evaluation process will provide credit only for the capabilities and advantages, which are presented by the Vendor in the written response. One original signed response must be submitted. One proposed contract with USETPA must be included with the response, if different from the Appendix C.

#### **D. COVER LETTER**

A letter of introduction, including the name and address of the Vendor(s) submitting the proposal and the name, address, and phone number of the person(s) to contact who will be authorized to present and bind the Vendor(s) to all commitments made in the response.

#### **E. VENDOR PROFILE**

Provide a company profile including the organization which will directly support the USETPA. The bidder MUST submit a letter on their letterhead certifying in which states that they are authorized to operate contractually and sell within.

#### **F. REFERENCES**

Provide a list of the three most recent, comparable contracts, if any, which you have performed, and include references for each. The Bidder should provide/demonstrate a record of past performance indicating its ability to fulfill this contract. Each Bidder will include company name, point of contact/individual's name, individual's title and phone number for each reference provided and year and type of service provided. Include a list of failed projects, suspensions, debarments, and significant litigations, if any. In addition provide additional information as requested.

#### **G. PROPOSAL**

Provide your proposal in such a way that is clear, concise, and according to the business/technical specifications and pricing requirements.

#### **H. APPENDIX OR ATTACHMENT TO PROPOSAL, (optional)**

Provide additional supporting literature

#### **I. ADDITIONAL REQUIREMENTS**

All submitted equipment/services must be identified as E-RATE eligible if the Vendor wishes to bid for E-Rate discounts to USETPA Subscribers. This will be identified by listing an E-Rate discount in the appropriate column(s) of the response. If the Proposer requires additional information on this please contact the USETPA at [info@usetpa.com](mailto:info@usetpa.com)

#### **J. DOCUMENTATION**

The successful Vendor (s) shall provide complete technical documentation of all products.

## K. MAINTENANCE AND SUPPORT

### L. GENERAL REQUIREMENTS

USETPA objects to and will not evaluate or consider any additional terms and conditions submitted with a bidder response unless written approval is obtained in advance of official submission. This applies to any language appearing in or attached to the document or contract as part of the bidder's response. Do not attach any additional terms and conditions. By execution and delivery of this document, including Appendix C, the bidder agrees that any additional terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect.

### M. INDEMNIFICATION

In carrying out these works, the Vendor(s) will act as an independent contractor and must agree to keep the USETPA indemnified against any and all claims, actions or demands that may be brought, made, or arise in respect of anything done, or omitted to be done by its employees who shall be and remain at all times and for all purposes, the servants or employees of the Vendor(s).

### N. CANCELLATION

The USETPA, reserves the right to cancel the contract resulting from this Request for Proposal if, in the USETPA's opinion, the service provided is not satisfactory or Vendor attempts to circumvent this RFP/Contract. In the event of cancellation, the Vendor(s) will have no right of action against the USETPA/USETPA Subscriber for damages; however, cancellation would not, in any manner, limit the USETPA's right to bring action against the Vendor(s) for damages for breach of contract. Ten days written notice of cancellation will be provided.

### O. INQUIRIES

All inquiries regarding this Request for Proposal must be in written form and directed to Senior Contract Administrator, via email, [info@usetpa.com](mailto:info@usetpa.com) .

No verbal representations, promises, statements or advice made by any employee of the USETPA/USETPA Subscriber should be relied upon.

All questions and answers will be posted on the USETPA website at [USETPA.org](http://USETPA.org) .

### P. ERATE REQUIREMENTS

If applicable, Vendor/Dealers/Resellers, should participate in the Federal Communication Commission's E-Rate discount program established under authority of the Federal Telecommunications Commission Act of 1996. The Vendor/Dealer's participation and implementation of this program must not include any service or administration fee. The submitted bids may be used to apply for E-Rate funding by schools/libraries.

Equipment/services included in the bid must be noted if they are/are not/partially (specify) E-Rate eligible. Vendor/Dealer/Reseller SLD SPIN numbers must be provided if Vendor/Dealer/Reseller is E-RATE eligible.

#### **Q. AVAILABILITY OF FUNDS**

Any and all payments to Vendor are expressly contingent upon and subject to the appropriation, allocation and availability of funds to the USETPA Subscriber for the purposes set forth in this Contract. If this Contract or any Purchase Order issued hereunder is funded in whole or in part by federal/state funds, the USETPA Subscriber's performance and payment shall be subject to and contingent upon the continuing availability of said federal/state funds for the purposes of the Contract or Purchase Order. If the term of this Contract extends into fiscal years subsequent to that in which it is approved, such continuation of the Contract is expressly contingent upon the appropriation, allocation and availability of funds by the State Legislature/Local School Board for the purposes set forth in the Contract. If funds to effect payment are not available, the USETPA Subscriber will provide written notification to Vendor. If the Contract is terminated under this paragraph, Vendor agrees to take back any affected deliverables and software not yet delivered under this Contract, terminate any services supplied to the USETPA Subscriber under this Contract, and relieve the USETPA Subscriber of any further obligation thereof. The USETPA Subscriber shall remit payment for deliverables and services accepted prior to the date of the aforesaid notice in conformance with the payment terms.

#### **R. ACCEPTANCE CRITERIA**

#### **S. FIRM PRICE DISCOUNT**

Pricing applies to purchases made under the terms and conditions set forth in this document and are firm for the stated Agreement term. The pricing discounts will be applied against Vendor's then current, General Price List at the time of acceptance of the Purchase Order by Vendor/Dealer to determine the net price to be paid by the USETPA Subscriber for Products and Services under the Agreement. USETPA requires that dealers sell Products or Services at not less than the stated pricing discounts set forth in the Agreement, and dealer may offer additional incremental discounts, in their sole discretion to USETPA Subscribers. To the extent that an USETPA Subscriber proposes additional requirements or a change to the stated terms and conditions set forth in the Agreement, both Vendor/Dealer and the USETPA Subscriber may mutually agree to such change in writing in a separate addendum.

#### **T. LUNSFORD ACT/CRIMINAL BACKGROUND CHECKS**

The Provider shall conduct at its own expense sexual offender registry checks on each of its employees, agents, ownership personnel, or vendor/dealers ("contractual personnel") who will engage in any service on or delivery of goods to USETPA Subscriber property or at a USETPA Subscriber sponsored event. The checks shall include at a minimum checks of the State Sex Offender and Public Protection Registration Program, the State Sexually Violent Predator Registration Program, and the National Sex Offender Registry ("the Registries"). For the Provider's convenience only, all of the required registry checks may be completed at

no cost by accessing the North Carolina Sex Offender Registry website at <http://sexoffender.ncdoj.gov/>. The Provider shall provide certification on Sexual Offender Registry Check Certification Form that the registry checks were conducted on each of its contractual personnel providing services or delivering goods under this Agreement prior to the commencement of such services or the delivery of such goods. The Provider shall conduct a current initial check of the registries (a check done more than 30 days prior to the date of this Agreement shall not satisfy this contractual obligation). In addition, Provider agrees to conduct the registry checks and provide a supplemental certification form before any additional contractual personnel are used to deliver goods or provide services pursuant to this Agreement. Provider further agrees to conduct annual registry checks of all contractual personnel and provide annual certifications at each anniversary date of this Agreement. Provider shall not assign any individual to deliver goods or provide services pursuant to this Agreement if said individual appears on any of the listed registries. Provider agrees that it will maintain all records and documents necessary to demonstrate that it has conducted a thorough check of the registries as to each contractual personnel, and agrees to provide such records and documents to the USETPA Subscriber upon request. Provider specifically acknowledges that the USETPA Subscriber retains the right to audit these records to ensure compliance with this section at any time in the USETPA Subscriber's sole discretion. Failure to comply with the terms of this provision shall be grounds for immediate termination of the Agreement. In addition, the USETPA Subscriber may conduct additional criminal records checks at Provider's expense. If the USETPA Subscriber exercises this right to conduct additional criminal records checks, Provider agrees to provide within seven (7) days of request the full name, date of birth, state of residency for the past ten years, and any additional information requested by the USETPA Subscriber for all contractual personnel who may deliver goods or perform services under this Agreement. Provider further agrees that it has an ongoing obligation to provide the USETPA Subscriber with the name of any new contractual personnel who may deliver goods or provide services under the Agreement. USETPA Subscribers reserves the right to prohibit any contractual personnel of Provider from delivering goods or providing services under this Agreement if USETPA Subscribers determines, in its sole discretion, that such contractual personnel may pose a threat to the safety or well-being of students, school personnel or others.

#### **U. DISPUTE RESOLUTION:**

The parties agree that it is in their mutual interest to resolve disputes informally. A claim by the Vendor shall be submitted in writing to the USETPA Member Contract Administrator for decision. A claim by the USETPA shall be submitted in writing to the Vendor's Contract Administrator for decision. The Parties shall negotiate in good faith and use all reasonable efforts to resolve such dispute(s). During the time the Parties are attempting to resolve any dispute, each shall proceed diligently to perform their respective duties and responsibilities under this Contract. If a dispute cannot be resolved between the Parties within thirty (30) days after delivery of notice, either Party may elect to exercise any other remedies available under this Contract, or at law. This term shall not constitute an agreement by either party to mediate or arbitrate any dispute.

## V. FEDERAL FUNDS

If the source of funds for a purchase are federal funds, the following federal provisions apply, as applicable: the Davis-Bacon Act (40 U.S.C. § 276a / 29 CFR Part 5), the Copeland “Anti-Kickback” Act (18 U.S.C. § 874 / 29 CFR Part 5), the Equal Opportunity Employment requirements (Executive Orders 11246 and 11375 / 41 CFR Chapter 60), the McNamara-O’Hara Service Contract Act (41 U.S.C. 351), Section 306 of the Clean Air Act (42 U.S.C. § 1857h, Section 508 of the Clean Water Act (33 U.S.C. § 1368), Executive Order 11738, Environmental Protection Agency regulations (40 CFR Part 15), the Contract Work Hours and Safety Act (40 U.S.C. § 3701-3708; 29 C.F.R. Part 5), Byrd Anti-Lobbying Amendment (31 U.S.C. 1352), Debarment and Suspension (Executive Orders 12549 and 12689), the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200), the Education Department General Administrative Regulations, 2 C.F.R. Parts 200 and 3474, and 34 C.F.R. Parts 75-77 and 81 (“EDGAR”), and mandatory standards and policies contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871), Title VI of the Education Amendments of 1972; Section 504 of the Rehabilitation Act of 1973; the Age Discrimination Act of 1975; Title 7 CFR Parts 15, 15a, and 15b; the Americans with Disabilities Act; 2 CFR Ch. II (1–1–15 Edition) § 200.322 Procurement of recovered materials.

### X.1. COMPLIANCE WITH FEDERAL FUNDS PURCHASES

In accordance with 2 CFR Part 200, Subpart E, Cost Principles, all purchases made with federal funds, regardless of the method of purchase, must be determined to be:  
Reasonable in cost (comparable to current fair market value) necessary to carry out the objectives of the federal program allowable under the federal cost principles and the terms and conditions of the award allocable (chargeable or assignable) to the grant program based on the relative benefits received.

### X.2. EDGAR (Education Department General Administrative Regulations) Compliance

The following provisions in the appendix are required and apply when federal funds are expended by an Approved Entity for any contract resulting from this procurement process. The Approved Entity is the sub grantee or sub recipient by definition.

Reference Education Department General Administrative Regulations (EDGAR) and Other Applicable Grant Regulations  
<https://www2.ed.gov/policy/fund/reg/edgarReg/edgar.html>

## W. CLOUD COMPUTING: Contracting Inclusions

Minimal list of items that must be included in any cloud contract that applies to any public entity. Each entity may have additional requirements that must be included in any contract.



**Appendices Index:**

**Appendix A:** Erate Universal Fund Discount Spin Number Form (Required from all Bidders participating in the SLD E-Rate Program)

**Appendix C:** Bidder Cover Form/Contract (Required for all bids)

**Appendix F:** Piggyback Clause (Required for all bids)

**Appendix G:** States where vendor wishes to offer services and where vendor maintains a physical location (Required for all bids)

**Appendix H:** M/WBE/SB certification (Required for all bids)

**Appendix I:** USETPA Administration Fees

**Appendix J:** USETPA Summary

**Appendix O:** Edgar Compliance (Required for Contracts using Fed \$)

## Appendix A: ERATE

**E-RATE UNIVERSAL SERVICE FUND DISCOUNT SPIN  
NUMBER FORM****(please return this with your response)**

Products being procured under this solicitation may be eligible for Universal Service Fund Discounts. Bidders desiring to participate in the Universal Service Discounts programs must comply with all applicable Federal Communications Commission and State laws/regulations/rules that apply to these programs. Vendors should indicate their willingness to participate in these programs by signing below:

Name of E-Rate Registered Vendor: \_\_\_\_\_

/

/

\_\_\_\_\_  
Authorized Signature\_\_\_\_\_  
Date\_\_\_\_\_  
SPIN Number

**Appendix C: Bidder Cover Form/Contract**

**Bidder Cover Form/USETPA Contract**

In compliance with this Invitation for Bids, and subject to all the conditions herein, the undersigned offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein. By executing this bid, I certify that this bid is submitted competitively and without collusion (N.C.G.S. 143-54), that none of our officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the NC General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (N.C.G.S. 143-59.2), and that we are not an ineligible vendor as set forth in N.C.G.S. 143-59.1. False certification is a Class I felony. By signing this proposal, upon an award of contract, bidder is bound by the terms and conditions of contracts as submitted to with response or in subsequent negotiations, except Appendix I is a nonnegotiable addendum to any contract that changes the original RFP. By execution and delivery of this document, the bidder agrees that any additional terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect on Appendix I. The countersigned contract will be posted online and may be downloaded.

Bidder:		FEDERAL ID OR SOCIAL SECURITY NO.	
Street Address:		P.O. Box	Zip:
City, State, Zip:		Telephone Number:	Toll Free Tel No.
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE			
TYPE OR PRINT NAME & TITLE OF AUTHORIZED PERSON SIGNING:		Fax Number	
AUTHORIZED SIGNATURE:	Date:	Email:	
Sales Contact:	Sales Contact Title:	Sales Contact Email:	
Accounting Contact:	Accounting Contact Title:	Accounting Contact Email:	

## Appendix F: Piggyback Clause

### Piggyback Clause:

Indicate on document if vendor agrees that other state and local public agencies may purchase under this bid at the same prices, terms and conditions stated in these bid documents, at the discretion of the successful bidder. Sales territories where piggybacking is approved for should be defined in Appendix G.

Agencies participating in this bid shall be responsible for obtaining approval from their approving body of authority when necessary and shall hold USETPA harmless from any disputes, disagreements or action which may arise as a result of using this bid.

\_\_\_\_\_ My firm is agreeable to allowing piggybacking at the same price, terms and conditions

\_\_\_\_\_ Sorry, I am unable to allow piggybacking for other state and local agencies

**Printed Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Appendix G**

Please place a check next to the States for which you wish to be approved for the use of USETPA contracts. Also, indicate the States in which you certify that you maintain a physical location.

State/Territory	Approved	Location	State/Territory	Approved	Location
USA			New Hampshire		
Alabama			New Jersey		
Alaska			New Mexico		
Arizona			New York		
California			North Carolina		
Colorado			North Dakota		
Connecticut			Ohio		
Delaware			Oklahoma		
Florida			Oregon		
Georgia			Pennsylvania		
Hawaii			Rhode Island		
Idaho			South Carolina		
Illinois			Tennessee		
Indiana			Texas		
Iowa			Utah		
Kansas			Vermont		
Kentucky			Virginia		
Louisiana			Washington		
Maine			West Virginia		
Maryland			Wisconsin		
Massachusetts			Wyoming		
Michigan			Washington DC		
Minnesota			Puerto Rico		
Mississippi			American Samoa		
Missouri			Guam		
Montana			American V.I.s		
Nebraska					
Nevada					

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

**Appendix H: Business Category**

**Business Category Certification**

**M/WBE**

**Please check all that apply and sign below.**

As defined by the US Equal Employment Opportunity (EEO), I certify that my company qualifies as the following;

Minority Business Enterprise: \_\_\_\_\_

Women Business Enterprise: \_\_\_\_\_

None of the above: \_\_\_\_\_

As defined by the US Small Business Administration (SBA), my company qualifies as;

Certified Small Business; \_\_\_\_\_

Signature: \_\_\_\_\_

Dated: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Company: \_\_\_\_\_

Position/Title: \_\_\_\_\_

## Appendix I: USETPA Fees

**USETPA FEES:** In order to maintain and enhance the quality and quantity of USETPA contracts, all vendors agree to pay a 1.0-1.75% fee of all purchases made by the Subscribers to the Consortia Purchasing Advisors, LLC (CPA) for expenses related to the maintenance and management of the USETPA. This 1.0-1.75% fee is not to be included in the pricing structure submitted for the bid. USETPA Subscribers may not be charged this fee in any manner.

- Vendor shall pay the USETPA Administrative Fee in the amount of one to one and three fourths percent (1.0-1.75%) in accordance with the conditions of the Agreement. The USETPA Administration Fee is calculated by multiplying the one to one and three fourths percent (1.0-1.75%) times the “Net Purchase Price”. The “Net Purchase Price” is defined as Vendor’s product list price, minus all applicable contract discounts (the 1.0-1.75% Administrative Fee may not be included), rebates or value added incentives, and excluding sales, use or other applicable taxes.
- Manufacturers responding to RFP may elect to pay fee on behalf of Channel Partners or require that approved Channel Partners be responsible for the fee.
- The Administrative Fee percentage shall be calculated as 1.75% for the first \$10,000,000 per calendar year for all categories of services and equipment procured through a USETPA Master Contract. For every \$10,000,000 in additional sales a Vendor sells in a single calendar year, the fee shall be reduced by .25% on those sales until the lowest rate of 1% is achieved. The fee structure shall be as follows;

<b>Sales</b>	<b>Fee</b>
<b>\$0-\$10,000,000</b>	<b>1.75%</b>
<b>\$10,000,001-\$20,000,000</b>	<b>1.50%</b>
<b>\$20,000,001-\$30,000,000</b>	<b>1.25%</b>
<b>\$30,000,001 and above</b>	<b>1.00%</b>

- The USETPA Administration Fee, along with a corresponding sales report, will be remitted quarterly in the form of a check or electronic payment (**Contact the Consortia Purchasing Advisors for the electronic payment information**) to:

- **Consortia Purchasing Advisors**

**Attn: Reports Manager**

**5 Revere Drive, Ste 200**

**Northbrook, Illinois 60062**

- Each remittance will include the time period covered including either a copy of the USEPTA Subscriber's correct invoice(s) or a data file including with all sales, dates, amounts and invoice numbers. The quarterly (calendar based) administrative fee shall be submitted by the last business day of the month for the previous quarter's actual sales (see table below). For example, the administrative fee for sales made in January-March is due by the end of April. A 1.5 percent (1.5%) per month charge will be added after the account is more than 30 days in arrears.

<b>Sales Quarter</b>	<b>Report/Admin Fee Due Date</b>
January-March	April 30
April-June	July 31
July-September	October 31
October-December	January 31

- **CONTRACT REPORTING REQUIREMENTS:** The Vendor/Dealer will be required to process quarterly usage reports via email to the CPA Reports Manager for all contracts. Report must be completed by the end of the month following the "sales" quarter. All "sales" must be reported. If "No Sales" are achieved for a specific quarter, then "Zero" (0) must be reported for that specific quarter. Failure to report the monthly activity by the 30th of the following month is grounds for cancellation of the contract, while not waiving any fees owed at that time or for the duration of any existing agreement between clients/subscribers and vendors. USETPA reserves the right to collect all owed fees at the expense of the vendor. If personal assistance is required, please contact the USETPA.
- Some contracts may require more stringent and timely reporting requirements, which must be met as specified separately
- Submission of Monthly Reports Email Address: **reports@cpadv.info**

## Appendix J: USETPA Summary

### US Educational Technology Purchasing Alliance

#### Summary

**Mission:**

To aggregate the demand for technology goods/services on behalf of K12 public and private schools, Head Start organizations, libraries, local government entities and all other public agencies and private PreK-12 schools to bargain for lower prices and better terms than most of these entities can achieve on their own and to lessen the time and expense of conducting local bids for good/services.

**Subscriber status:**

USETPA has issued RFPs and awarded convenience/master contracts to multiple vendors for the same service in order to achieve wide geographical coverage and to allow for vendor preference. Subscriber status is open to all eligible schools, libraries and public agencies at no cost. There is no legal obligation on behalf of any Subscriber to the alliance and there is no mandatory requirement on behalf of any Subscriber to use the contracts offered by the Alliance. Initially, bids were conducted in association with numerous professional organizations on behalf of all North Carolina K-12 public and private schools, Head Start organizations, and public libraries. The contracts have since been expanded to include local government agencies and used in 25 separate states. This RFP is specifically targeted to expanding the number of qualified vendors in additional sales territories as well as provide terms and conditions that comply with additional state purchasing laws.

When using USETPA contracts, Subscribers will not have to conduct their own bids for goods/services and will not have to file their own E-Rate Form 470's. This will save them considerable time and insure local boards that all proper bidding requirements have been met, including the best possible pricing for goods/services. Non-Subscriber entities are eligible to use the contract and be in compliance with the terms and conditions of the convenience contract providing that the sale is registered with the USETPA on the USETPA website and copies of all purchase orders are remitted to the USETPA. Only formal Subscribers may use the USETPA Form 470 for E-Rate purposes.

**Products:**

USETPA issues bids on behalf of its Subscribers for a comprehensive array of technology goods/services that include both E-Rate eligible and non-eligible goods/services.

The items covered include telephone, cellular, internet access, wide area network, hosted email, web hosting, and hosted VoIP telephone recurring services as well as equipment including computers, servers, switches, wireless and wired local area networks, cabling/wiring, tablets, and maintenance.

Individual RFP(s) have been issued to cover a broad category of products. Vendors are encouraged to respond to all or parts of each RFP. USETPA expects demand to be in excess of \$10,000,000 for most categories. Additional goods/services will be added as Subscriber status identifies new products for which they would like to receive bids. Future RFPs are planned for other goods and services including Office Supplies and Furniture.

To be apprised of future opportunities and receive RFP notifications, vendors are encouraged to register at [www.usetpa.org](http://www.usetpa.org).

## Appendix O: Edgar Compliance

### EDGAR Compliance

The following provisions are required and apply when federal funds are expended by USETPA Approved Entity for any contract resulting from this procurement process. The USETPA Approved Entity is the sub grantee or sub recipient by definition.

In addition to other provisions required by the federal agency or non-Federal entity, all contracts made by the non-Federal entity under the Federal award must contain provisions covering the following, is applicable.

- (A) **Contracts for more than the simplified acquisition threshold currently set at \$150,000 which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide such sanctions and penalties as appropriate.**

Pursuant to Federal Rules (A) above, when federal funds are expended by Approved Entity, Approved Entity reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

***Does Vendor Agree? Yes \_\_\_\_\_ initials of authorized representative***

- (B) **Termination or cause and for convenience by the grantee or sub grantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)**

Pursuant to Federal Rules (B) above, when federal funds are expended by Approved Entity, Approved Entity reserves all rights and to immediately terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Vendor, in the event vendors fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, contract, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the contract and/or the procurement solicitation. Approved Entity also reserves the right to terminate the contract immediately, with written notice to vendor, for convenience, if Approved Entity believes, in its sole discretion that it is in the best interest of approved Entity to do so. The vendor will be compensated for work performed and accepted and goods accepted by Approved Entity as of the termination date if the contract is terminated for convenience of Approved Entity. Any award under this procurement process is not exclusive and Approved Entity reserves the right to

purchase goods and services from other vendors when it is in the best interest of Approved Entity.

**Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative**

**(C) Rights to Inventions Made Under a Contract Agreement. If the Federal award meets the definition of “funding agreement” under 37 CFR §401.2(a) and the recipient or sub recipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement, “; the recipient or sub recipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.**

**Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative**

**(D) Where applicable (see 40 U.S.C. § 3701), all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations at 29 C.F.R. Part 5. See 2 C.F.R. Part 200, Appendix II, ¶ E. Compliance with the Contract Work Hours and Safety Standards Act require;**

(1) Overtime requirements. No contractor or subcontractor contracting for any part of the contract work which may require or involve the employment of laborers or mechanics shall require or permit any such laborer or mechanic in any workweek in which he or she is employed on such work to work in excess of forty hours in such workweek unless such laborer or mechanic receives compensation at a rate not less than one and one-half times the basic rate of pay for all hours worked in excess of forty hours in such workweek.

(2) Violation; liability for unpaid wages; liquidated damages. In the event of any violation of the clause set forth in paragraph (1) of this section the contractor and any subcontractor responsible therefor shall be liable for the unpaid wages. In addition, such contractor and subcontractor shall be liable to the United States (in the case of work done under contract for the District of Columbia or a territory, to such District or to such territory), for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic, including watchmen and guards, employed in violation of the clause set forth in paragraph (1) of this section, in the sum of \$10 for each calendar day on which such individual was required or permitted to work in excess of the standard workweek of forty hours without payment of the overtime wages required by the clause set forth in paragraph (1) of this section.

(3) Withholding for unpaid wages and liquidated damages. The (write in the name of the Federal agency or the loan or grant recipient) shall upon its own action or upon written request of an

authorized representative of the Department of Labor withhold or cause to be withheld, from any moneys payable on account of work performed by the contractor or subcontractor under any such contract or any other Federal contract with the same prime contractor, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same prime contractor, such sums as may be determined to be necessary to satisfy any liabilities of such contractor or subcontractor for unpaid wages and liquidated damages as provided in the clause set forth in paragraph (2) of this section.

(4) Subcontracts. The contractor or subcontractor shall insert in any subcontracts the clauses set forth in paragraph (1) through (4) of this section and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime contractor shall be responsible for compliance by any subcontractor or lower tier subcontractor with the clauses set forth in paragraphs (1) through (4) of this section.

***Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative***

**(E) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended – Contracts and sub grants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).**

Pursuant to Federal Rule (G) above, when federal funds are expended by Authorized Entity, the vendor certifies that during the term of an award for all contracts by Authorized Entity resulting from this procurement process, the vendor agrees to comply with all applicable requirements as referenced in Federal Rule (G) above.

***Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative***

**(F) Debarment and Suspension (Executive Orders 12549 and 12689) – A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the system for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p.235), “Debarment and Suspension”. SAM exclusions contain the names of parties debarred, suspended or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.**

Pursuant to Federal Rule (H) above, when federal funds are expended by Authorized Entity, the vendor certifies that during the term of an award for all contracts by Authorized Entity resulting from this procurement process, the vendor certifies that neither it nor its principals is presently

debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

***Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative***

**(G) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) – Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certified to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that take place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.**

Pursuant to Federal Rule (I) above, when federal funds are expended by Authorized Entity, the vendor certifies that during the term and after the awarded term of an award for all contracts by Authorized Entity resulting from this procurement process, the vendor certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). The undersigned further certifies that:

- No Federal appropriated funds have been paid or will be paid for on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
- If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Stand Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- The undersigned shall require that the language of this certification be included in the award documents for all covered sub- awards exceeding \$100,000 in Federal funds to all appropriate tiers and that all sub recipients shall certify and disclose accordingly.

***Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative***

## (H) Record Retention- 2 CFR § 200.333

When federal funds are expended by Approved Entity for any contract resulting from this procurement process, the vendor certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.333. The vendor further certifies that vendor will retain all records as required by 2 CFR § 200.333 for a period of three years after grantees or sub grantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed. Note that record retention requirements may be longer as per state or local law and/or E-Rate regulations and vendor should meet the most restrictive requirements.

***Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative***

(I) **Davis Bacon Act & Copeland Anti-Kickback Act. The Davis-Bacon Act only applies to the emergency Management Preparedness Grant Program, Homeland Security Grant Program, Nonprofit Security Grant Program, Tribal Homeland Security Grant Program, Port Security Grant Program, and Transit Security Grant Program. It does not apply to other FEMA grant and cooperative agreement programs, including the Public Assistance Program.**

Compliance with the Copeland “Anti-Kickback” Act requires;

- (1) Contractor. The contractor shall comply with 18 U.S.C. § 874, 40 U.S.C. § 3145, and the requirements of 29 C.F.R. pt. 3 as may be applicable, which are incorporated by reference into this contract.
- (2) Subcontracts. The contractor or subcontractor shall insert in any subcontracts the clause above and such other clauses as the FEMA may by appropriate instructions require, and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime contractor shall be responsible for the compliance by any subcontractor or lower tier subcontractor with all of these contract clauses.
- (3) Breach. A breach of the contract clauses above may be grounds for termination of the contract, and for debarment as a contractor and subcontractor as provided in 29 C.F.R. § 5.12.”

***Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative***

(J) **Equal Employment Opportunity-Except as otherwise provided under CFR Part 60, all contracts that meet the definition of “federally assisted construction contract” in CFR § 60-1.3 will include the EOC provided under CFR § 60-1.3.**

During the performance of this contract, the contractor agrees as follows;

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive considerations for employment without regard to race, color, religion, sex, or national origin

(3) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(4) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor

(5) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders

(6) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions as may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(7) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any

subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance: Provided, however, That in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency the contractor may request the United States to enter into such litigation to protect the interests of the United States.”

***Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative***

**(K) Additional FEMA Certifications - Vendor to certify if they wish to be considered eligible for contracts containing federal FEMA assistance.**

1) Access to records;

(1) The contractor agrees to provide (insert name of state agency or local or Indian tribal government), (insert name of recipient), the FEMA Administrator, the Comptroller General of the United States, or any of their authorized representatives access to any books, documents, papers, and records of the Contractor which are directly pertinent to this contract for the purposes of making audits, examinations, excerpts, and transcriptions.

(2) The Contractor agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.

(3) The contractor agrees to provide the FEMA Administrator or his authorized representatives’ access to construction or other work sites pertaining to the work being completed under the contract

2) DHS Seal Logo and Flags

The contractor shall not use the DHS seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre- approval

3) Compliance with Federal Law, Regulations, and Executive Orders

This is an acknowledgement that FEMA financial assistance will be used to fund the contract only. The contractor will comply will all applicable federal law, regulations, executive orders, FEMA policies, procedures, and directives

4) No Obligation by Federal Government

The Federal Government is not a party to this contract and is not subject to any obligations or liabilities to the non-Federal entity, contractor, or any other party pertaining to any matter resulting from the contract



5) Program Fraud & False or Fraudulent Statements or Related Acts

The contractor acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the contractor's actions pertaining to this contract

***Does Vendor Agree? Yes \_\_\_\_\_ Initials of authorized representative***

Signature: \_\_\_\_\_

Dated: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Company: \_\_\_\_\_

Position/Title: \_\_\_\_\_