**Part 1 Page 1- REQUEST FOR PROPOSALS**

**E-Rate Eligible Category 1 Products and Services Funding Year 2025: 7/1/2025 – 6/30/2026**

**“Rural School District Internet Access”**

|  |  |  |
| --- | --- | --- |
| Ballard Elementary School | **Applicant** | **Ballard Elementary School District** |
| **Billed Entity Number** | **143984** |
| **Establishing Form 470** | 250003745 RFP 150A-25 (Nickname: BESD\_2025\_470\_C1) |

|  |
| --- |
| ***Submit QUESTIONS about this RFP or associated Form 470 by email to:*** |
| **bids@summae-rate.com**  |
| Unless indicated elsewhere (e.g., by amendment to this RFP), the deadline for submission of **QUESTIONS** is **12pm PST, 20 calendar days from the Certified Date**shown on the associated Form 470. |

|  |
| --- |
| ***Submit PROPOSALS, including Signature Page, must be uploaded using the “Select File” and “Upload” features in the following web page:******Page and Pricing Form by email1 to:*** |
| [**https://summae-rate.com**](https://summae-rate.com)**/bids** |
| Unless otherwise indicated (e.g., by amendment to this RFP), the deadline for submission of PROPOSALS is **5pm PST,****28 calendar days from the Certified Date**shown on the associated Form 470. |

|  |  |
| --- | --- |
| **Event** | **Critical Dates** |
| FCC Form 470 Posted/RFP Released | **Nov 22, 2024** |
| Questions from Bidders Due | **Dec 12, 2024** |
| Vendor Meeting | **None** |
| Bid Due Date | **Dec 20, 2024** |
| School Board Meeting | **None** |
| Contract Start Date | **July 1, 2025** |

1 In the unlikely event of technical difficulties, please contact the Technical Contact indicated on the Form 470

**PART 2 – FY2025 REQUEST FOR PROPOSAL INFORMATION, TERMS AND CONDITIONS**

Summae-rate.com[Summa E-rate Solutions , Consultant Registration Number 17009831], *an E-rate Consulting firm*, is *not* the E-Rate *Applicant*. Summa E-rate Solutions is the Applicant’s *Consultant,* retained to handle competitive bidding exchanges and the E‑Rate application process. Therefore, please:

* Put the Applicant’s name and contact information when submitting your proposal and in all communications related to your proposal.
* Include the Fully executed RFP Signature Page, signed by Vendor’s authorized representative. Please respond to the Request for Internet Service Requirements on Page 5.
* Please do not contact school personnel either with general questions about E‑Rate, or to offer ineligible services or services not requested on this RFP, or to request a meeting or offer trial equipment.
* This Request For Proposals [RFP] is posted in conjunction with the Schools and Libraries Division [SLD] Form 470, in partial fulfillment of the requirements for Federal Communications Commission [FCC] Universal Service Fund *[E‑Rate]* discounts.

PLEASE REFRESH YOURSELF AND REVIEW THE E-RATE COMPETITIVE BIDDING PROCESS BY CLICKING ON THE FOLLOWING LINK:

[**https://www.usac.org/e-rate/applicant-process/competitive-bidding/**](https://www.usac.org/e-rate/applicant-process/competitive-bidding/)

This document is uploaded to the Universal Service Administrative Company [USAC] E-Rate Productivity Center [EPC] for the associated Form 470.

The APPLICANT provides:

* Applicant specific details (e.g., Name, Billed Entity Number [BEN], entity address(es), Form 470 number, background about current situation and desired solutions)
* Proposal submission details:
	+ Questions email and deadline
	+ Submission mechanism and deadline
	+ Vendor meeting dates and times (if applicable)
* Description of Products and Services Sought, with minimum requirements for:
	+ Relevant technical specifications
	+ Quantities of products/services sought
* Evaluation criteria
* Other specifics (if applicable)

**All critical dates** (e.g., deadline for submission of questions, site walks (if any), deadline for submission of proposals) **are noted on the first page of this document.**

*FY2025 REQUEST FOR PROPOSAL INFORMATION, TERMS AND CONDITIONS*

*A) Scope of RFP*

*Applicant seeks proposals for E-Rate eligible products and services in the categories listed in*

*Service Requests section of the Form 470 and further detailed in PART 3 – BIDDER*

*INFORMATION, section A. Products And Services Sought.*

*Applicant intends to obtain cost-effective, technically sound, eligible products and services to*

*improve and maintain telecommunications, Internet access services, and/or technology.*

*infrastructure, to enhance student achievement in its classrooms, or to enhance patron experience*

*in its library. Applicant seeks only proposals that are fully compliant with all state and local.*

*procurement rules, codes and regulations, as well as being fully compliant with all rules and*

*guidelines of the E-Rate program.*

*Per E-Rate rules, confidential bids are not acceptable.1 By submitting a proposal, Vendor*

*acknowledges that any reference to “Proprietary” or “Confidential” on any document or*

*communication is waived.*

*Vendors may bid on the entire RFP or on any numbered group of section A. Products And*

*Services Sought in PART 3 - BIDDER INFORMATION. Within each group, a complete*

*solution is required.*

1. *Recommended Proposal Elements*

*Vendors should submit proposals including detailed descriptions, with all costs associated with*

*the delivery of the products and services (parts, labor, installation, testing, acceptance,*

*configuration, turn-up, applicable taxes/fees, shipping, and so on). Any line items not 100%*

*eligible for E-Rate discounts according to program rules should be isolated, with separate*

*subtotals.2 Items that are conditionally eligible should also be noted. Ineligible items should be eliminated when possible (or minimized where necessary but ineligible) and broken out as separate line items or separate proposals.*

*A responsive proposal will include the following elements:*

*a) Applicant reference info:*

*• Reference to the establishing Form 470 Number*

*• Applicant name*

*• Applicant Billed Entity Number [BEN]*

*• Applicant address*

*• Which requirements your proposal addresses (e.g., A.1, A.2 in PART 3 – SPECIFIC INFORMATION section)*

*FY2025 REQUEST FOR PROPOSAL INFORMATION, TERMS AND CONDITIONS*

 *Vendor background*

*• Name*

*• Vendor Contact Information (email and phone)*

*• Form of Organization*

*• Names of Principals*

*• Years in Business*

*• Confirmation of the Vendor Qualifications as further described below*

*• Vendor Service Provider Identification Number [SPIN]*

*• References: K-12 or library references for similar projects*

*• Evidence of routinely successful SLD funding approvals*

*• Low frequency of high scrutiny applications*

*• As appropriate for the products/services sought by Applicant:*

* *Staff Industry Credentials: Certifications such as CCNA, HP AIS (or*

*functional equivalent, summarized as the number of employees holding*

*each type of certification)*

* *Corporate Credentials: Applicable licenses, capabilities, and memberships*

*such as General Contractor or Electrical licenses, bonding, BICSI membership*

*• Details are provided in section B. Products And Services Sought of PART 3 –*

*BIDDER INFORMATION*

*• Provide succinct list of exceptions to any requirements, terms, or conditions of this RFP*

*• Confirm that no products or components from any “covered company,” as*

*designated by the FCC, are included in the proposal.*

*e) Vendor’s proposed Terms and Conditions, including any early termination provisions*

*f) For Category 2 proposals, signed “Additional Category 2 Provisions” pages*

*g) For Category 2 proposals, commitment to promptly provide the USAC Bulk Upload*

*Template3, upon applicant decision to award and before the Form 471 deadline*

*h) Signature of Vendor’s authorized representative on cover letter and/or Proposal Signature*

*Page of the SPECIFIC section*

*The preferred format for narrative portions of proposals is a single PDF file addressing these*

*clearly identified topics.*

*The completed written proposal form must be without erasures or alterations unless both parties*

*initial each correction. Delivery of the proposals will be considered sufficient authorization from*

*the Vendor to the Applicant to make a binding contract based on the scope, terms and conditions*

*of the proposal, with this RFP and any amendments to it included intact or by reference. If*

*Vendor’s proposal is selected for award, Applicant will provide a written acceptance to establish*

*the legally binding agreement required by E-Rate program rules. Nevertheless, either party may*

*later require additional documents, such as detailed Customer Service Orders or Purchase Orders.*

*3 Available at* [*https://www.usac.org/e-rate/applicant-process/applying-for-discounts/fcc-form-471-*](https://www.usac.org/e-rate/applicant-process/applying-for-discounts/fcc-form-471-)

**Requests for Proposal**

The entity filing an FCC Form 470 can issue a request for proposal (RFP) in addition to the FCC Form 470. In general, an RFP is a formal bidding document that describes the project and requested services in sufficient detail so that potential bidders understand the scope, location, and any other requirements. However, we use “RFP” or “RFP document” generically to refer to any bidding document that describes your project and requested services in more detail than in the fields provided on the FCC Form 470.

**PART 3 –** **PRODUCTS AND SERVICES SOUGHT**

# Applicant Background

The following background information about the Applicant may be helpful in preparing a responsive bid.

Any resulting contract will be with:

|  |  |
| --- | --- |
| **Applicant Name** | **Ballard Elementary School District** |
| Applicant Authorized Signer | Pam Rennick, Superintendent, Ballard Elementary School District 805-688-4812, PRennick@ballardschool.orgALWAYS cc: tech@summae-rate.com |
| INSTRUCTION FOR BIDDER | Do NOT contact Pam Rennick directly until an award has been made. |

# Entities/Sites

Entities included in this RFP are listed below; bidders should rely on this RFP list of entities as the definitive list of entities participating in this RFP. (Note that due to EPC data discrepancies, the Form 470 **Billed Entity** or **Recipients of Service** or **Number of Eligible Entities** sections may differ from those listed below)

**Summary of Entity information and Recipients of Internet Service**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Entity Number** | **Entity Name** | **Address of Service** | **Current Bandwidth** | **Contract Expires** | **Connection Type** |
|  143984 |  Ballard Elem School District | 2425 School St., Solvang, CA 93463 | 500Mbps | 6/30/25 | Leased Lit Fiber |
| 10706 | Ballard Elem School | 2425 School St.Solvang, CA 93463 |

The following background information about the Applicant may be helpful in preparing a responsive bid.

**General Description**

**Ballard Elementary School District** is comprised of students in grades kindergarten through eighth grade and presently has about 113 full-time students and is in Solvang, CA.

# Network Topology

# The current one (1) 500Mbps fiber connections is located at 2425 School St., Solvang, CA 93463. The incumbent provider furnishes an Ethernet demarcation devise for a 500 Mbps Business Fiber Premium internet service with an Ethernet hand-off to the LAN inside the utility/telecom room of the school building. The service includes up to 5X useable static IP addresses (/29 block) per site.

# Products And Services Sought

The applicant, **Ballard Elementary School District**, is seeking responses from qualified providers of ISP Services for its **Solvang, CA school site and is seeking 36-month and 60-month Leased lit fiber bids or non-fiber internet access and data transmission mediums that offer the same functionality as fiber. 60-months is the preferred term.** Any and all updated bid information, forms, including addenda, will be distributed thru the Summa E-rate website, located at <https://summae-rate.com/bids/> and the FCC Schools and Library Division (SLD), “Universal Service Fund” (a.k.a. “E-Rate funding) website https://data.usac.org/publicreports/Forms/Form470Rfp/Index.

Vendors may bid on the entire RFP or on any numbered group of this section.

In the event the bidder knows of another or other technologies, topologies or pathways would improve functionality or reduce cost, the bidder is encouraged to propose recommended alternatives.

**Category 1 (Data Transmission and/or Internet Access)**

* 1. **Category 1, Direct Internet Access**

|  |
| --- |
| **Direct Internet Access Requirements** |
| **Recipient of Service Service Address FY2025 Bandwidth** | **Handoff** | **CPE** | **Static Public IP Addresses** |
| **Ballard Elementary School District***Service to start:**7/1/2025***2425 School St., Solvang, CA 93463****500Mbps - 5 Gbps** | Preferred:Single-mode fiber (optical)   | Preferred:Applicant-owned router or equivalent, may be eligible for C2 | Preferred: 5 usable |
| **36- or 60-month Service\*** |  |  |  |
| **Contracted Service\* (Preferred Term = 60 months)** |  |  |  |

\*See Products and Services Sought

**Other Category 1 Technical Specifications:**

* + - Vendor will provide all E-Rate Category 1 eligible services.
		- Please include a detailed cost breakdown of labor and/or any other fees
		- Proposal should include ***Applicant’s preferred handoff***, or clearly describe the handoff to be provided.
		- Symmetrical bandwidth preferred.
		- Network availability = 99.99% preferred
		- Burstable bandwidth = **No**
		- Major provider (ideally “tier 1” or “tier 2” or substantial peering arrangements) preferred.
		- Implementation: to coincide with E-Rate funding year dates, maximize potential E-Rate discounts, and coordinate with expiring contracts, Applicant strongly prefers that activation be on, or within a few days of, **7/1/25**, with preference of up to 30 days prior to allow for testing.2 **Please include *commitment date for activation* in your proposal.** Sooner implementation would be acceptable if Early Termination Fees do not apply to existing service.

# Other Category 1 Proposal Specifications:

* + - Provide a brief summary, in non-technical terms, of what the solution provides.
		- Please provide a pricing form. **No deviation may be introduced between the submitted pricing and any resulting contract.**
		- Provide pre-discount pricing for:
			* E-Rate *eligible* items including taxes, shipping, and installation (if applicable)
			* Items *not eligible* for E-Rate support including taxes, shipping, and installation (if applicable)
			* Other expenses as appropriate
		- Provide separate line-item subtotals for *eligible* vs. *ineligible* product, taxes, shipping, and initial installation/configuration, if applicable
		- Taxes: Include sales taxes based on tax rate for site listed in RFP (explicitly for zip code of installation site)
		- Confirm that no products or components from any “covered company,” as designated by the FCC, are included in the proposal.
		- Submission of a proposal acknowledges:
			* Applicant reserves the right to award all, part, or none of the services set forth in this procurement.
			* Proposal is valid through the close of the application window and will be honored through completion of any associated documentation.
		- Proposals that include generic price lists will be considered non-responsive and will not be included in the evaluation.

2 Applicant understands that overlapping service is “redundant” and not eligible for E-Rate discounts.

# Other Category 1 Contract Specifications:

* + - Applicant requests complete contractual documentation indicating prices at different service levels over the contract term, including possible voluntary extensions. If pricing varies by site, please indicate so in spreadsheet in separate rows or by adding additional tabs or by submitting separate a Pricing Form per site.
		- Contract with no early termination fees preferred.
		- All Vendor pricing, including installation, must remain valid through the E-Rate application window, including through necessary extension periods, until all products/services are delivered to Applicant.
		- Strongly prefer the proposal, and any resulting contract, include monthly and installation pricing at each bandwidth level for the full term of contract, as well as allow optional upgrades during the contract term, without new competitive bidding.
		- Confirm that no products or components from any “covered company,” as designated by the FCC, are included in the proposal.
		- Service Provider Invoicing [SPI]: unless expressly negotiated otherwise, Applicant selects Service Provider Invoicing via this notice and prior to the submission of the Form 471, consistent with FCC regulation **§54.514 Payment for discounted service.**
		- **To coincide with E-Rate funding year, Applicant strongly prefers that contract expiration date be exactly and explicitly 6/30** (i.e., not based on number of months from contract signatures, or service turn up). Unless, explicitly stated otherwise, the preferred contract terms include:
			* Initial term of *approximately* three (3) years, ending on 6/30 of the year that begins the 3rd year of service.
			* Initial term of *approximately* five (5) years, ending on 6/30 of the year that begins the 5th year of service.
			* One (1) 1-year optional renewals after initial term
			* Option to upgrade bandwidth during the contract term.

**B. Vendor Conference / Walk Through**

*Vendor Conference Call and/or Walk Through information follows.*

*ONLY checked items () apply.*

*☒ A Vendor Conference Call will NOT be held. Please do not request a special*

*appointment.*

*☒ A Vendor Walk Through will NOT be held. Please do not request a special*

*appointment.*

*☐ A Vendor Conference Call will be held at the date and time to be announced via RFP*

*Amendment. Please RSVP via email to the email address on the cover page above.*

*This will allow us to notify all interested parties of the call-in details, and any.*

*unanticipated, last-minute changes in scheduling. Please do not request a special*

*appointment for a different time; all vendors should attend at the same time to help.*

*ensure that everyone has the same information.*

*☐ Attendance is optional. ☐ Attendance is mandatory.3*

*☐ A Vendor Walk Through will be held at date and time and location to be announced*

*via RFP Amendment. Applicant’s safety measures must be followed.*

*Please RSVP via email to the email address on the cover page above. This will allow.*

*us to notify all interested parties of any unanticipated, last-minute changes in*

*scheduling or starting location. Please do not request a special appointment for a*

*different time: all vendors should attend at the same time to help ensure that*

*everyone has the same information.*

*☐ Attendance is optional. ☐ Attendance is mandatory.4*

*Sign-in and a printed business card or similar contact information will be expected.*

*upon arrival. Answers to clarifying questions not adequately explained in the*

*existing RFP materials will be posted as RFP Addenda or Amendments on the same.*

*web site as this document and available to all vendors. Please note that, depending.*

*on the bid evaluation criteria indicated herein, where attendance is optional, nonattendance.*

*might still affect scoring on a secondary proposal evaluation factor.*

*Vendors should never offer gifts or favors of any kind, however small, to anyone.*

*associated with the Applicant or Applicant’s family members. Submission of a*

*proposal constitutes a presumptive certification that there is no conflict of interest.*

3 In the event less than 3 responsive bidders have complied, Applicant, in its sole discretion, reserves the right to waive this requirement if it is deemed in its best interest.

4 In the event less than 3 responsive bidders have complied, Applicant, in its sole discretion, reserves the right to waive this requirement if it is deemed in its best interest.

# Evaluation Criteria

Each responsive proposal meeting the minimum qualifications will be evaluated using weighted criteria including price of the eligible products and services as the highest weighted factor. In the best interest of the Applicant, the following secondary factors may be considered, as further described below:

|  |
| --- |
| **Category 1 Criteria** |
| Price of eligible products/services |
| Functionality/completeness/specifications of proposed solution |
| Low cost of *in*eligible products and services |
| Projected implementation timeline based on prior performance |
| Vendor qualifications |
| Contract terms and conditions |
| Extent to which a single-provider, turnkey solution is provided |
| Quality of proposal document(s) |

**Bid Evaluation Criteria**

**Ballard Elementary School District** will evaluate and select the winning bid based on the following criteria and weighted in the order listed in its relative importance:

1) Price – This criterion is required and must be the most heavily weighted, per E-Rate program rules. Average annual price over the full initial term (not just the first year) will be taken into consideration. **Ballard Elementary School District** will be evaluating price based ONLY on the eligible monthly and eligible “one-time” costs (30%)

2) Functionality/completeness/specifications of proposed solutionFor Category 1, *functionality* could include: whether provider is considered “Tier 1,” “Tier 2,” or lower; peering arrangements; whether service is symmetrical; speed and latency of connections; whether a sufficient number of public (static) IP addresses are offered; whether public forward and reverse (in-addr.arpa) lookup DNS services are provided; uptime guarantee or Service Level Agreement [SLA]; whether Customer Premise Equipment [CPE] meets the criteria to be treated as Category 1, rather than Internal Connections. Performance characteristics such as scalability of bandwidth are more desirable. Other considerations might include compatibility with existing solutions. Solutions that emphasize safety, privacy, and security are strongly preferred. (10%)

3) Low cost of *in*eligible products and services8Such as: Early Termination Fees, Applicant labor to modify existing configurations. (10%)

4) Projected implementation timeline based on prior performance- Vendor proven ability to install efficiently (on 1st attempt) and timely (7/1 of funding year, unless otherwise specified elsewhere in this RFP). (10%)

5) Vendor qualifications- Factors to be considered include industry experience, references, credentials, certifications, and E-Rate compliance/experience/track record. (10%)

6) Contract terms and conditions- Among other considerations as to terms and conditions, Applicant-friendly terms and conditions are preferred. Contracts with relatively onerous termination fees are apt to be scored lower, other things being equal. Flexibility to adapt to changing circumstances, such as moves or school closures, is advantageous. Commitment to SPI invoicing will generally be scored higher. Voluntary renewal options are a plus. Consolidated billing (mapped to Funding Request Numbers [FRNs] and SPINs) is also a plus. Contract expiration date that is exactly 6/30 is strongly preferred for Category 1 services. Commitment to include pricing for scalable bandwidth over time in contract will be more favorable. (10%)

7) Extent to which a single-provider, turnkey solution is provided - *Turnkey* means within a given category, Applicant has a preference, but not a requirement, for a solution wherein a single contract/single vendor mostly/completely addresses all of the requirements. (10%)

8) Quality of proposal document(s) - The extent to which the proposal documents are customized to Applicant’s needs, clear, complete, consistent, accurate, and adhere to RFP requirements. Vendor responsiveness during bid evaluation, attendance at any optional walk-through/bidders’ conference, are also favorable. (10%)

For any given solution, after elimination of proposals that are disqualified, the proposal that is deemed to most cost-effectively meet the stated Applicant requirements, and therefore in the best interest of the Applicant, will be selected.

Disqualification factors include:

* Non-compliance with E-Rate program rules or with state or local regulations
* Failure to meet stated required vendor qualifications.
* Deviation between the submitted Pricing Form, Products/Services and any resulting contract form.
* Failure to address at least 90% of stated scope of section for which proposal is submitted.
* Failure to submit a complete solution to any numbered group of **Products And Services Sought** in section B above. (For example, if Applicant seeks a full complement of Network Components and vendor proposes only the firewall, the firewall proposal will be disqualified unless ***no*** reasonably complete solutions have been received.)
* Failure to meet minimum specifications for key components of solution (such as port speed of switches)
* “Budgetary” pricing: prices for products and services must be firm commitments; surprise special construction costs are not acceptable.

In the event that the Applicant receives less than two (2) responsive bids, the Applicant, at its sole discretion, reserves the right, but is not obligated, to waive individual disqualification factors (other than program/legal non-compliance) for any other bids received in an effort to further ensure fair and open competitive bidding.

# Other Specifics

No additional specifications are available.

**REQUEST FOR PROPOSALS**

**Proposal Signature Page**

|  |  |  |
| --- | --- | --- |
| Ballard Elementary School | **Applicant** | **Ballard Elementary School District** |
| **Billed Entity Number** | **143984** |
| **Establishing Form 470** | **250003745 (**Nickname: BESD\_2025\_470\_c1) |

|  |
| --- |
| **For the Vendor:** |
| Signature |
| Printed Name and Title Vendor Name |
| Date SPINThis proposal is submitted in response to **SPECIFIC INFORMATION,** section B.  . (for clarity, please provide name of section as well)**CERTIFICATION:** Submission of this proposal certifies all equipment, and services are compliant with the FCC Order (FCC 19-121) prohibiting the sale, provision, maintenance, modification, or other support of equipment or services provided or manufactured by Huawei, ZTE, or any other “covered company” deemed a national security threat.**An email acknowledgment will be sent to Vendor after emailed proposal is received; if acknowledgement email has not been received within 3 business days, please send inquiry****to** **bids@summae-rate.com** **for confirmation.** |

|  |
| --- |
| **For the Applicant:**If Vendor’s proposal is selected for award, Applicant will execute below to confirm acceptance. |
| Applicant Authorized Signature | mm/dd/yy |
| SignatureName | DateTitle |
| Printed Name | Title |