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Request for Proposals (RFP)

#RFP 10-ECSM-0124 for E-Rate Cat 2 Consortium Louisiana

Form 470 #240001143

Issued by:

IDEA Public Schools Louisiana, Inc. Louisiana, Inc.

c/o IDEA Public Schools

2115 W Pike Blvd

Weslaco, TX 78596

Proposal Closing Date:

2:00 PM CST

December 15, 2023

IDEA Public Schools Louisiana, Inc. Louisiana, Inc. is accepting Proposals from qualified and experienced Vendors/Contractors to provide Firewall as a Service (FWaaS) Cloud solution if these items are applicable. The "District" needs these devices configured and maintained for the E-Rate period. (For a list of specific equipment, model numbers, and quantities, see scope of work.)

IDEA Public Schools Louisiana, Inc. ("IDEA") reserves the right to revise and amend the specifications prior to the date set for the receipt of Proposals. Respondents are requested to clarify any ambiguity, conflict, discrepancy, omission or other error(s) in this RFP in writing and at least 10 (ten) business days in advance of the submission deadline. Revisions or amendments, if any, will be made by issuing an errata or addenda that is posted to IDEA's website. Every effort will be made to also send the errata or addenda issued to the parties known to have been furnished a complete copy of this RFP. It is the responsibility of each Respondent, prior to submitting the Proposal, to check IDEA's website to determine if an errata or addenda was issued and, if so, to obtain such errata or addenda.

Inquiries and requests for information affecting the solicitation must be submitted in writing and shall be directed to <https://forms.gle/6Gn9czxJKxxGFxJZA> no later than **10 days before the bid deadline of December 5, 2023, at 3:00 PM CST.** A copy of the question and response will be uploaded into the [EPC](#) RFP section of this Form 470. All interested parties may access this RFP package online at the following address: <https://ideapublicschools.org/our-story/finance-budget/>

All proposals must be received no later than **the bid deadline stated on Form 470.** A completed signed bid proposal must be submitted via [Public Purchase](#). Any Proposal received later than the specified time will be disqualified. IDEA Public Schools Louisiana, Inc. prefers to work with Vendors capable of providing the needs for the entire project within a Region or Phase as indicated on the attached spreadsheet. Therefore, Vendors must submit a complete proposal for all regional items. **No partial bids will be considered or accepted.**

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PART I – GENERAL INFORMATION AND INSTRUCTIONS

Introduction and Purpose

IDEA Public Schools Louisiana, Inc. ("IDEA") is a Louisiana nonprofit corporation and a tax-exempt organization pursuant to the Section 501(c)(3) of the Internal Revenue Code. Pursuant to La. R.S. 17:3971, et seq. and its Contract for Charter with the Louisiana Department of Education, as renewed by the Superintendent of Education, IDEA is an open-enrollment charter holder, governmental entity and public school system. IDEA prepares Louisiana students from underserved communities for success in college and citizenship. IDEA is a growing network of 3 high-performing charter schools serving approximately students located throughout East Baton Rouge Parish regions. Although IDEA's growth is rapid, it is also carefully planned. Schools begin with select grade levels and eventually reach full scale as a Pre-K-12 campus as grade levels are added to accommodate the students' advancement.

IDEA's mission is College for All. IDEA serves primarily low-income students in underserved areas of both rural and urban communities. Over 80% of IDEA students are considered low-income and one of every three students is the first in their family to go to college. Since the first graduating class in 2007, 100% of seniors have been accepted and matriculated to a college or university every year for fourteen consecutive years. Thanks to a rigorous path to college that begins in Pre-K, IDEA students attend selective universities throughout the country, win national awards and scholarships, and complete college at a rate six times the national average for low-income students.

Note: While IDEA's affiliates serve students in other states, this Request for Proposals and any subsequent contract is only for goods or services provided to IDEA's Louisiana based charter school and campuses.

Objectives

Utilizing the Request for Proposals (RFP) method of procurement, IDEA Public Schools Louisiana, Inc. ("District") is seeking a qualified vendor (VENDOR) for Firewall as a Service (FWaaS) cloud solution for purchase and maintenance throughout the E-Rate period. The applicant must meet the Tenants Zero Trust Architecture or equivalent, as outlined in the NIST 800-207 Special Publication. The new service is planned to begin on April 1, 2024, which represents the expiration of the current service and/or the establishment of new service. Seeking proposals for 40 months (4 months E-Rate ineligible and 36 months E-Rate eligible).

1) Funding Authority

IDEA will utilize State and Federal funds to finance any purchases of goods and/or services through the contract(s) awarded to the successful Vendor(s)/Contractor(s) through this RFP, including any purchase orders issued under said contract(s)

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2) Rationale for RFP

Upon consideration of the requirements for the procurement under this RFP, IDEA determined that the RFP was the appropriate purchasing method for the following reasons:

- (a) The selection of the successful respondent will not be made primarily on the basis of price.
- (b) The purchasing requirements cannot be described by detailed specifications.
- (c) IDEA requires that each respondent provide innovative solutions to address the purchasing requirements set forth in this RFP.
- (d) IDEA anticipates negotiating or desires to negotiate the final award under this RFP to ensure that the goods and/or services sought do, in fact, address the purchasing requirements.

Note: Only USAC vendors qualify to bid. Any potential bidder will need to create an account via USAC portal in order to qualify. Please use this link and instructions. <https://www.usac.org/e-rate/service-providers/>

3) Proposal Submissions

- a) Proposal Response Requirements. Proposals should be prepared in such a way as to demonstrate a straightforward, concise delineation of capabilities that satisfy the requirements of this RFP. To qualify for evaluation, a Proposal must have been submitted on time and must materially satisfy all mandatory requirements identified in this RFP. Respondents must follow the format instructions detailed below in preparing and submitting a Proposal. Each Respondent is responsible for ensuring that IDEA has the appropriate company name, authorized representative, and contact information on file for the purpose of receiving notices, changes, addenda or other critical information relating to this RFP.
- b) Eligible Respondents. Respondents who can meet the technical specifications for quality and other terms of this RFP, who are not debarred and/or suspended from conducting business with IDEA by federal and state funded agencies and have the right to transact business in Louisiana are invited to respond. A prospective Vendor/Contractor must affirmatively demonstrate responsibility and good standing. Submitting a Proposal represents to IDEA that Vendor/Contractor meets the following requirements:
 - Possesses or is able to obtain adequate financial resources to perform under this RFP.
 - Can comply with the required scope of this RFP.
 - Has a satisfactory record of integrity and ethics.
 - Is otherwise qualified and eligible to receive an award.
 - Is in good standing with the applicable national or state agencies and associations.
- c) Required Format. To be considered, the Proposal must be prepared according to the stated specifications and specifications and should include the following information and content. Failure to include these items may result in disqualification. For details, see **Part III, Section 2, Proposal Requirements.**

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- d) Submission of Proposals. Proposals shall be submitted via the web-based software portal, [Public Purchase](#). A signed, submitted Proposal submitted via Public Purchase constitutes an offer to perform work and/or deliver the products specified in this RFP. Proposals shall be received no later than **2:00 PM CST on Friday, December 15, 2023**, along with the requisite signature pages, required attachments, and certification forms. Proposal envelopes received by mail must be clearly marked with this RFP number and title and addressed as indicated in this RFP. Late Proposals will **not** be accepted. Faxed or emailed Proposals will **not** be accepted. Deviations from any terms, conditions and/or specifications, although discouraged, shall be conspicuously noted in writing by the Respondent and shall be included with the Proposal in **Attachment U**.
- e) Use of Brand Names. The use of brand and manufacturer's names is for the purpose of brevity in establishing type and quality of merchandise and is not restrictive. Manufacturer, trade, and/or brand name must be indicated for each article and, when omitted, IDEA will consider Proposal to be as specified. Illustrations and complete description must be included with the Proposal if proposing other than specified.
- f) Incurred Costs. All costs incurred in the preparation and submission of the Proposal shall be borne solely by the Respondent. Where Respondents may be required to perform a presentation, give demonstrations, provide samples and/or technical literature, or participate in any interview process as related to this RFP, all costs shall be borne by the Respondent.
- g) Proposed Costs. Respondent shall provide information on all costs that IDEA may incur related to providing the requested goods and/or services herein. Respondent will provide a complete fee and cost detail supporting all elements of its Proposal. The cost detail must include a narrative for each fee or cost element. If Respondent does not expect IDEA to incur any costs, the Proposal shall state "No costs to IDEA." Costs should be submitted utilizing or referencing **Attachment S**.
- h) Discounts. Although IDEA may take advantage of any discount offered by Respondent for payment in less than thirty (30) calendar days, IDEA shall not consider discounts offered by Respondent during the evaluation of the Proposal submitted. IDEA will only evaluate Proposals based on the criteria set forth in **Part IV** of this RFP.
- i) Tax Exemption. IDEA is exempt from federal excise tax, state, and local tax. Do not include tax in cost projections. Any taxes included in cost projections will not be included in the tabulation of any awards.
- j) Withdrawal of Submitted Proposal. At any time prior to the closing date and time, a Respondent may withdraw a submitted Proposal by submitting a request to withdraw in writing to solicitations@ideapublicschools.org. By submitting a Proposal, each Respondent guarantees that the Proposal submitted, including the price(s) detailed therein, shall remain firm for a period of not less than one hundred twenty (120) days from this RFP closing date. No Proposal may be withdrawn during the 120-day period of offering.
- k) Proposal Constitutes Offer. A Proposal submitted in response to this RFP is an offer to contract with IDEA, based upon the terms, conditions, and specifications of this RFP and IDEA's standard terms and conditions. A Proposal does not become a contract unless and until it is accepted by IDEA and approved by its Board of Directors ("Board"), as required by law and policy. Submission of a Proposal shall be construed to mean that the Vendor/Contractor agrees to carry out all conditions set forth in this RFP. By submitting a Proposal, Respondent affirms it has read and understands this RFP and terms and conditions set to govern the contract. Any proposed variation from the specifications, terms, and conditions shall be clearly identified in the Proposal

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(see **Attachment U**). Respondents must describe in detail any proposed variation to the stated specifications, terms, and conditions. Please note that variations are strongly discouraged and may be grounds for rejection at IDEA's sole discretion. Please refer to earlier instructions and **Part I, paragraph 6, RFP Clarification and Questions** below on submitting any questions as to ambiguity, conflict, discrepancy, omission, or other error(s) that may relate to any requested variation in writing. If no changes are indicated, IDEA shall expect to receive the goods and/or services exactly as specified.

- l) RFP and Proposal Constitute Contract. Upon the Board's acceptance of Respondent's Proposal and approval of a contract with Respondent, this RFP and Proposal shall constitute the written, binding contract between the parties (the "Contract" or "Agreement"). IDEA shall not accept any contract or other written agreement from a Respondent submitted as part of its Proposal. IDEA reserves the right to tender its own contract for the goods and/or services solicited through this RFP. If IDEA is willing to consider or needs a contract draft tendered from Respondent, IDEA will request this from Respondent, but contract terms must be consistent with this RFP and IDEA's standard terms and conditions.
- m) Undue Influence. In order to ensure the integrity of the selection process, Respondent's officers, employees, agents, or other representatives shall not lobby or attempt to influence a vote or recommendation related to the Vendor/Contractor, directly or indirectly, through any contact with IDEA Board members or officials from the date this RFP is released until the award of a fully executed and approved Contract. By submitting a Proposal, Respondent affirms that the Vendor/Contractor has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to any IDEA representative in connection with the Proposal submitted.
- n) Proposal Errors. Respondents will represent that its Proposal is a true and correct statement and contains no cause for claim of omission or error. Request for withdrawal of Proposal is allowed based on proof of mechanical error; however, the Vendor/Contractor may be removed from consideration or from any approved Vendor/Contract list maintained by IDEA.
- o) False/Misleading Statements. Proposals which contain false or misleading statements, or which provide references which do not support an accurate attribute or capability of Vendor/Contractor, may be rejected. If, in the opinion of IDEA, such information was intended

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to mislead IDEA in its evaluation of the Proposal and the attribute, condition, or capability as a requirement of this RFP, IDEA shall reject the Proposal.

- p) Proposal Signatures. The Proposal must be signed by an authorized representative with proper signatory authority. By submitting a Proposal, Respondent represents and warrants that the individual submitting the Proposal and the documents made part of the Proposal is authorized to sign such documents on behalf of the Vendor/Contractor and to bind the Vendor/Contractor under any contract that may result from the Proposal submission. The signature should indicate the title or position that the individual holds in the entity.
- q) Rights Reserved by IDEA and Restrictions on the RFP Process.
- IDEA reserves the right to cancel or withdraw this solicitation in whole or in part by issuance of a revised or amended RFP or a cancellation of this RFP.
 - IDEA reserves the right to select any Proposal, or combination thereof, it deems the best value and in the best interest of IDEA, regardless of price. See **Part IV** for the evaluation criteria used in this RFP.
 - IDEA reserves the right to award one or more contracts, in parts if not in whole, to a single or to multiple Respondents or to create a pool of approved Vendors/Contractors. See **Part I, paragraph 11, Selection of Vendor(s)**, below. The fact that IDEA may make multiple awards should be taken into consideration by each Respondent and “all-or-none” combinations of goods and/or services will not be considered if not solicited.
 - IDEA reserves the right to reject any and/or all Proposals, to award contracts for individual products or services as may appear advantageous, and to negotiate separately in any manner necessary to serve the best interests of IDEA. IDEA further reserves the right to accept, reject, or negotiate modifications in any terms of a Respondent’s Proposal or any parts thereof.
 - IDEA reserves the right to waive any formalities or technicalities if deemed in the best interest of IDEA. IDEA also reserves the right as sole judge of quality and equality.

Tentative RFP Timeline- The schedule for the primary events of this project are as follows. Items 3 through 6 are approximate dates and are subject to change based upon the evaluation process, SLD funding and School Board approval.

RFP Issue Date:	November 15, 2023
Respondent Question Cut-Off Date:	Tuesday, December 5, 2023, at 3:00 PM
CST Addendum Issue Date:	Friday, December 8, 2023
Proposal Closing Date & Time:	Friday, December 15, 2023, at 2:00 PM CST
Evaluation Period:	December 16, 2023 – January 5, 2024
Board Meeting & Approval:	January 24 - 30, 2024
Initial Proposed Contract Term:	March 31, 2024-June 30, 2027

4) RFP Clarification and Questions

Questions must be submitted to <https://forms.gle/6Gn9czxJKxxGFxJZA>. E-mails and phone calls will not be accepted. Q & A will be posted in [EPC](#) as a 470 RFP document no later than **December 5, 2023**. Questions submitted by Respondents before the submission along with any errata or addenda to this RFP, if applicable, answers will be posted on the IDEA website at: <https://ideapublicschools.org/our-story/finance-budget/pcs/bids-rfps/> or [Public Purchase](#). IDEA will not answer questions verbally and any informal oral answers provided by IDEA or its agents shall

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not be binding. No modification or amendment to this RFP shall be valid unless it is set forth in writing, via a signed addendum or amendment from IDEA.

5) Addenda or Errata

Any interpretations, corrections, additions, or changes to this RFP will be communicated to Respondents by the issuance of an addenda or errata. It is the responsibility of Respondent, prior to submitting a Proposal, to determine whether an addenda or errata was issued by checking IDEA's website: [Bid Opportunities & RFPs - IDEA Public Schools Louisiana, Inc.](#) or the RFP section of this Form 470 in EPC, the E-Rate portal. All Respondents shall comply with the requirements specified in any addenda or errata issued by IDEA.

6) Respondent Responsibility

IDEA expects Respondents to be thoroughly familiar with all specifications and requirements of this RFP. Respondent's failure or omission to examine any relevant form, article, site, or document will not relieve Vendor/Contractor from any obligation regarding this RFP. By submitting a Proposal, Respondent is presumed to concur with all terms, conditions, and specifications of this RFP unless otherwise specifically stated in **Attachment U – Deviations and Exceptions**.

Respondents who have not obtained this RFP directly from IDEA, or who may have downloaded the document from the IDEA website or Public Purchase, shall be responsible for immediately notifying IDEA of their interest in order to receive all written addenda or errata on a timely basis. A Respondent who does not notify IDEA and submits a Proposal without receipt of all addenda or errata issued may be deemed to have submitted a Proposal not responsive to this RFP.

7) Contract Award

Written notice of award mailed or otherwise furnished to the successful Vendor(s)/Contractor(s) results in a binding contract without further action required by either party. IDEA further reserves the right to tender its own contract for products or services. IDEA may not accept, and may reject, any contract or other written agreement submitted by a Respondent as part of its Proposal or offered by the successful Vendor(s)/Contractor(s). If IDEA is willing to consider or needs a contract draft tendered from Respondent, IDEA will request this from Respondent, but contract terms must be consistent with this RFP and IDEA's standard terms and conditions.

8) Selection of Vendor(s)

IDEA may award this RFP to multiple Vendors/Contractors or to the Vendor/Contractor IDEA determines, in its sole discretion, provides the best value to IDEA, based upon the evaluation of Proposals. Thus, the result will not be determined by price alone but upon the applicable criteria as listed under **Part IV – Evaluation Criteria** in this RFP.

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9) Contract Term

The Agreement(s) resulting from this RFP will be in effect as of a date established by mutual consent of IDEA and selected Vendor(s)/Contractor(s). The initial project term is expected to be **March 31, 2024, to June 30, 2027, with the option to renew**. At its sole discretion, IDEA **may renew this contract for up to an additional two (2) consecutive years** if the services have not been delivered or completed. Each renewal shall be effective for one (1) additional year effective from [term, e.g., July 1 through June 1 of any given year]. IDEA shall convey via written notice to the selected Vendor(s)/Contractor(s) at least thirty (30) days in advance of an Agreement expiration informing Vendor/Contractor of IDEA's intent to renew, non-renew, amend the Agreement, or terminate. If the Vendor/Contractor does not believe that it can renew the contract, the Vendor/Contractor shall provide IDEA with written notice at least ninety (90) days prior to the Agreement's expiration date.

10) Criminal Background Checks

If a Vendor/Contractor or subcontractor may have direct interaction with students pursuant to an Agreement resulting from this RFP, Vendor/Contractor must coordinate and cooperate with IDEA to ensure that appropriate criminal history review requirements are met as required by the requirements of La R.S. 15:587.1 by working with the Louisiana State Police to conduct fingerprint checks on Contractor's representatives who will have continuing duties under this Agreement and will have direct contact with students. No employee, agent, representative, volunteer, applicant for employment, or other person associated with Contractor who has been convicted of a felony or misdemeanor involving moral turpitude shall be permitted to perform services for IPSL. Contractor shall certify that it will ensure that this requirement is met. Fingerprinting records and records of compliance with La R.S. 15:587.1 will be available to IPSL for inspection and review during normal business hours of Contractor and upon request of IPSL or governmental authorities. Covered employees or subcontractors of a Vendor/Contractor with disqualifying criminal histories are prohibited from providing goods and/or services to IDEA. Vendor/Contractor may also be required to provide a list of personnel who will be assigned to do the work. When requested, this information must be furnished within 48 hours and shall apply to any new personnel due to employee turnover. Vendor/Contractor shall cooperate with IDEA to ensure that all employees and subcontractors assigned to work under a contract have successfully passed a criminal background check prior to assignment. Any person or persons not acceptable to IDEA shall be prohibited from working on the Agreement. IDEA reserves the right to refuse entry onto its school grounds to any individual whose background check does not meet the requirements established by IDEA pursuant to Louisiana law. Vendor/Contractor shall provide certification that all of its personnel are eligible and that required background checks have been conducted as required by law. If Vendor/Contractor requires IDEA's assistance in running the required background checks, Vendor/Contractor shall pay, or reimburse, for IDEA's administrative costs and expenses for same, at the rate of per person checked. Complete Attachment O.

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11) Insurance Requirements

No Insurance Requirements as to IDEA. The insurance coverages specified in this RFP are the minimum requirements, and these requirements do not lessen or limit the liability of the Vendor/Contractor. The Vendor/Contractor shall maintain, at its own expense, any additional kinds or amounts of insurance that it may deem necessary to cover its obligations and liabilities under this RFP and Agreement.

- a) The insurance coverages specified in this RFP are the minimum requirements, and these requirements do not lessen or limit the liability of the Vendor/Contractor. The Vendor/Contractor shall maintain, at its own expense, any additional kinds or amounts of insurance that it may deem necessary to cover its obligations and liabilities under this RFP and Agreement.
- b) The successful Vendor/Contractor will at a minimum carry and maintain Workers' Compensation, General Liability, and Property Damage Liability Insurance. Insurance Certificates must be submitted with the Proposal. IDEA reserves the right to review all insurance policies pertaining to this RFP to guarantee that the proper coverage is obtained and maintained by the Vendor/Contractor.
- c) Vendor/Contractor shall keep in full force and effect the following minimum limits of insurance (or higher):
 - i) General Liability: Vendor/Contractor shall maintain Commercial General Liability Insurance, including coverage for bodily injury, property damage, and contractual liability, with the following minimum limits: **\$1,000,000.00** per occurrence and **\$2,000,000.00** general aggregate. The policy shall include liability arising out of premises, operations, independent contractors, personal injury, advertising injury, and liability assumed under an insured contract, and must provide coverage for all claims that may arise from the performance of the Agreement or completed operations, whether by Vendor/Contractor or anyone directly or indirectly employed by Vendor/Contractor. Such policy shall name IDEA as an Additional Named Insured and include a Waiver of Subrogation Clause.
 - ii) Cyber Liability and Technology Professional Liability Errors and Omissions: Vendor/Contractor shall maintain coverage appropriate to Vendor's/Contractor's work under this Agreement, with limits not less than **\$2,000,000.00** per occurrence. Coverage shall be sufficiently broad to respond to the duties and obligations undertaken by Vendor/Contractor in this Agreement and shall include, but not be limited to, claims involving infringement of intellectual property, copyright, trademark, invasion of privacy violations, information theft, release of private information, extortion, and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties, as well as credit monitoring expenses with limits sufficient to respond to these obligations.
 - The policy shall include, or be endorsed to include, **property damage liability coverage** for damage to, alteration of, loss of, or destruction of electronic data and/or information "property" of IDEA in the care, custody, or control of Vendor/Contractor.
 - **Cyber liability coverage** in an amount sufficient to cover the full replacement value of damage to, alteration of, loss of, or destruction of electronic data and/or information "property" of IDEA that will be in the care, custody, or control of Vendor/Contractor.

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Such policy shall name IDEA as an Additional Named Insured and include a Waiver of Subrogation Clause.

Workers' Compensation:

- iii. Workers' Compensation: Vendor/Contractor shall obtain and maintain Workers' Compensation Insurance in an amount consistent with statutory benefits outlined in the Louisiana Workers' Compensation Act.
 - a) Each insurance policy to be furnished by the successful Vendor/Contractor shall include "IDEA Public Schools Louisiana, Inc." as a certificate holder, as Additional Named Insured, and include a Waiver of Subrogation Clause. Please note a certificate of insurance showing named-insured is not adequate to establish this status or fulfill this requirement.
 - b) Additionally, each insurance policy shall, by endorsement to the policy, include a statement that a notice shall be given to IDEA by certified mail thirty (30) days prior to cancellation or upon any material changes to coverage.
 - c) Vendor/Contractor may not commence services or work relating to the Agreement prior to placement of coverage. Vendor/Contractor shall keep the required insurance coverage in full force and effect at all times during the term of the Agreement, or any extension thereof, during any warranty period, of the Agreement.

12) Administrative Procedure for Bidder Complaints

Members of the public having complaints regarding IDEA's purchasing procedures or operations may present their complaints or concerns via telephone to IDEA's Anonymous Ethics and Compliance Hotline, 833-380-1041.

PART II – SCOPE OF WORK AND PERFORMANCE REQUIREMENTS

Scope of Work

The following describes the requirements that the successful Respondent(s) will be required to meet. IDEA will use objective criteria specified in **Part IV** to review Proposals and potentially make multiple awards, if deemed in the best interest of IDEA, in its sole discretion. IDEA Public Schools Louisiana, Inc. is seeking a qualified vendor (VENDOR) for Firewall as a Service (FWaaS) cloud solution for purchase. The applicant must meet the Tenants Zero Trust Architecture or equivalent, as outlined in the [NIST 800-207](#) Special Publication. This service may be agent based and installed on each individual workstation for all staff and students at IDEA. We are requesting instructional licenses with all the technical specifications and features provided. **Agent must include content filtering as an add-on license, erate ineligible.**

License Specifications

We are requesting 2,578 instructional licenses 103 non-instructional licenses must be included for a total of 2,925 licenses) with all the technical specifications and features listed below.

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Technical Specifications (or equivalent)

1.0 General Description:

- A. Cloud Native Firewall as a service - iBoss complete edition;
- B. E-Rate eligibility required-3-year license/subscription;
- C. iBoss FWaaS-Next Generation Firewall-Zero Trust Complete;
- D. iBoss agent & Management Integrated;
- E. iBoss Content Filter integrated;
- F. Dedicated Cloud Resource Allocation;
- G. Global Availability;
- H. Cloud Access Security Broker (Google, Microsoft and others);
- I. NIST-800-207 Policy compliance;
- J. Identity Services (SAML, OAUTH) Integration;
- K. Identity (User, Device, Applications, Services) based policy;
- L. Unified Policy Enforcement/Management;
- M. Private Network Access via Tunnels, SD-WAN;
- N. Multi-Edge Secure Access.

Service Level Specifications (or equivalent)

- A. Service Level Guarantee (Availability and Reliability)
- B. Network Latency
- C. Support Services
- D. Service Credit Procedures

•NOTE• - *E-Rate ineligible Add-ons must be separated - these will be listed separately on the Form of Proposal. If software is appliance or on-prem based, it will not be considered. Must be cloud native software and must be E-Rate eligible software.*

IDEA Main Administrative Sites

1. IDEA Headquarters Rio Grande Valley
2115 W Pike Blvd, Weslaco, TX 78596
2. IDEA Austin Regional Office
5816 Wilcab Rd B, Austin, TX 78721

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Section 1: Overview

PART III – PROPOSAL SUBMISSION AND REQUIREMENTS

1) Proposal Submission (*Faxed or emailed Proposals will not be accepted*).

Proposals may be submitted using via [Public Purchase](#) or by sending a hard copy to:

IDEA Public Schools Louisiana, Inc. Louisiana, Inc.
c/o IDEA Public Schools
Attn. Purchasing Department-RFP 10-ECSM-0124 – Form 470 #240001143
2115 W Pike Blvd
Weslaco, TX 78596

Proposals sent by mail must be in a sealed envelope marked with the RFP Number and Title and 470# and include:

- a) One (1) clearly identified hard copy ORIGINAL of the Proposal.
- b) One (1) copy of the Proposal on FLASH DRIVES, marked with Respondent's name.

Note: Only USAC vendors qualify to bid. Any potential bidder will need to create an account via USAC portal in order to qualify. Please use this link and instructions. <https://www.usac.org/e-rate/service-providers/>

2) General Requirements

Vendors providing proposals must provide documentation of their capability, qualifications, certifications, financial stability, and experience in providing the goods and services requested in this RFP. They must provide all documentation requested by RFP. Any proposal or bid that does not include all required documentation will automatically be excluded.

2.1 Bid Process

- a) All responding vendors must be universal service fund (USF) E-Rate vendors with a currently valid service provider identification number (SPIN). Vendors must also be registered with the

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Federal Communications Commission (FCC) and have and provide an FCC registration number (FRN).

- b) All responding vendors must be in good standing with the Universal Service Administration Company (USAC) Schools and Libraries Division and eligible to provide products and services through the discount program. Vendor must put (SPIN) numbers on all documents, such as invoices.
- c) Vendor must have the resources to utilize discount payment methods, and to invoice the district for their portion of the project based upon discount levels and funding approval. Vendor should provide the cost breakdown between the invoices proposed to be provided to the district and the invoices provided to the Schools and Libraries Division (SLD).

2.2 Technical Experience

- a) The Vendor should be certified to install, certify, and warranty a Structured Cabling Solution. The solution could incorporate Cat copper cabling, and both multimode and single mode fiber optic cabling, as necessary. All cabling must be plenum rated. Manufacturer certifications for the proposed equipment should be attached to the proposal.
- b) The Vendor should have staff with experience installing, configuring and maintaining "eligible" network electronics. This could include switches, routers, servers, firewalls, phone KSU, etc. Staff certifications should include A+, Network +, CCNA. Attach a copy of certifications with the proposal as well as manufacturer certifications for any equipment proposed should be included.
- c) Vendor will be required to provide a Project Manager as a single point of contact for the overall project. Vendor shall provide a list of the staff members that will be working on the project, along with their experience, qualifications, and certifications.

2.3 Vendor References

- a) Vendor shall provide a listing of at least three (3) projects of a similar size, cost, and technical expertise, completed within the last two years. This reference list should include the customer's name, contact name, address daytime telephone number, and a brief description of the completed project. References should be for E-Rate Projects, if possible.

3) General Conditions

Preparation of Bids

- a) Before submitting a proposal, each Vendor is expected to thoroughly examine the actual conditions (if applicable), specifications, general conditions, and all other related contractual documents. Failure to do so will be at the Vendor's risk and will not bar the Vendor's obligation to perform if a contract is awarded pursuant to this Invitation to Bid. Each Vendor must satisfy himself/herself by personal examination and by such other means as he/she may prefer as to the actual conditions and requirements under which the contract will be performed.
- b) It is the total responsibility of the Vendor to return the bid to the place called for, by the deadline. No bid or modifications received after the time specified in this Invitation to bid will be considered for award.
- c) Changes, additions, or any other modifications which are not specifically called for in the bid may cause the bid to be rejected as not being responsive to the Invitation to Bid.
- d) All bids shall be signed in longhand in ink in all indicated areas. Failure to sign bid documents or initial corrections on bid documents may cause rejection of the bid.

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- e) Unless otherwise requested by the District, all items supplied pursuant to this bid shall be new and unused.

Prices

- a) All prices and notations must be typed or written in ink. Verify all prices before submission, since they may not be corrected after bids are opened. No oral or telegraphic modification will be considered
- b) This RFP is seeking products and services to be secured during the FCC's E-Rate Year 27 Calendar Year 2024 July 1, 2024, through September 30, 2025. Therefore, all prices shall remain firm and in effect from the date of the submission of the bid until September 30, 2025.

Addenda and Change Orders

- a) All prices and notations must be typed or written in ink. Verify all prices before submission, since they may not be corrected after bids are opened. No oral or telegraphic modification will be considered.
- b) If any Vendor finds discrepancies in, or omissions from, the bid documents, he/she may submit a written or faxed request for clarification or correction thereof. A copy of the request for clarification and the response thereto will be faxed to all Vendors at the fax number given by the Vendor when the Vendor picked up the RFP.

Renewal of Ongoing Service

- a) The DISTRICT reserves the right to renew ongoing service for telecommunications and wireless service for up to five (5) years following the initial agreement. Such renewal shall be in writing, and subject to availability of funds in subsequent years.

Actual Conditions

- a) Vendor shall be responsible for examining actual site(s) and certifying all measurements, specifications, and conditions affecting the work to be performed at the site(s).
- b) By submitting a bid, Vendor warrants that they have made such site examination(s) as they deem necessary as to the condition of the site(s), its accessibility for materials, workers, and utilities, and ability to protect existing surface or subsurface improvements.
- c) No claim for allowance of time or money will be allowed as to such matters for any undiscovered conditions on the site(s).

Delivery / Risk of Loss or Damage

- a) The Vendor is required to absorb all delivery costs. The DISTRICT shall not be liable for any delivery, storage, demurrage, packing, or freight charges involved in the shipment of the item(s).
- b) The Vendor shall be responsible for all transportation, loading, and unloading of materials or equipment associated with the project.

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- c) The Vendor agrees to assume all risk of loss or damage until the project is accepted by the DISTRICT.

Taxes

- a) State and local taxes and all other applicable taxes are to be included in bids.

Liabilities

- a) The Vendor shall be required to agree to save, defend, hold harmless, and indemnify the DISTRICT against any and all liability, claims, and costs of whatsoever kind and nature for injury to, or death of, any person or persons, and for loss or damage to any property occurring in connection with, or in any way incident to, or arising out of, the occupancy, use, service, operations, or performance of work or supply of material under the terms of this contract, resulting in whole or in part from the negligent acts or omissions of Vendor, and subcontractor, or any employee, agent, or representative of Vendor or subcontractor.
- b) The Vendor shall be required to agree to hold the DISTRICT, its officers, agents, servants, and employees harmless from liability of any nature or kind, including the use of any copyrighted or un-copyrighted composition, secret process, patented or unpatented invention, articles, or appliances furnished or used under this bid. The Vendor agrees to defend, at the Vendor's expense, any and all actions brought against the DISTRICT or himself because of unauthorized use of such articles.

Default by the Vendor

- a) In case of default by Vendor, the IDEA Public Schools Louisiana, Inc. may procure the articles or services from other sources and may deduct from any monies due, or that may thereafter become due, to the Vendor, the difference between the price named in the contract or Purchase Order and the actual cost thereof to the IDEA Public Schools Louisiana, Inc.. Prices paid by the IDEA Public Schools Louisiana, Inc. shall be considered the prevailing market price at the time such purchase is made.
- b) Default by the Vendor may be sufficient cause to remove Vendor from the approved Vendor list for subsequent bids.
- c) Periods of performance may be extended if the facts as to the cause of delay justify such extension in the opinion of the Purchasing Agent of the DISTRICT.

Attorney Fees / Legal Forum

- a) In the event that a suit or action is brought by either party to the contract to enforce any of the rights thereunder, the prevailing party shall be entitled to recover such attorney fees as the court may adjudge reasonable.
- b) The parties hereby agree that any legal dispute arising from this agreement shall be settled in the appropriate jurisdiction.

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Assignment of Contract

- a) The Vendor shall not assign the whole or any part of this agreement or any payment due or to become due thereunder, without the written consent of the DISTRICT and all sureties who have executed bonds on behalf of the Vendor in connection with this contract.

Warranty

- a) In addition to all warranties which may be prescribed by law, all item(s) shall conform to specifications, drawings, and other descriptions and shall be free from defects in materials or workmanship.
- b) The Vendor also warrants that, to the extent the item(s) are not manufactured pursuant to detailed designs furnished by the "District", they will be free from defects in design.
- c) Such warranties for any equipment provided, including warranties prescribed by law, shall run to "District", its successors, assigns, and customers, and to users of the items, for a period of one (1) year, after delivery, or such longer period as may be prescribed by law or by additional agreement.
- d) The "District" wants to secure a cabling infrastructure capable of supporting Technology for several years. Vendors must be certified by the Manufacturer and able to provide a twenty (20) year cabling warranty.

Award Criteria

- a) The "District" plans to accept the proposal / bid that is the best value for the school district. In making that determination, it will consider the following criteria. The "District" does not purchase solely on the basis of low bid, however, pricing will be the heaviest weighted criteria considered.

Award of Bid

- a) The "District" will award bids to the highest responsive and responsible Vendor(s). The "District" reserves the right: (1). to award bids received on the basis of the entire list of items; (2). to reject any or all bids, or any part thereof; (3). to waive any informality or irregularity in the bid; and (4). to accept the bid that is in the best interest of the "District", price and other factors listed above.
- b) The "District" may contract with an acceptable party who is one of the three (3) lowest responsible Vendors for the procurement, maintenance, or both, of electronic data-processing systems and supporting software in any manner the "District" deems appropriate.
- c) A Purchase Order or written notice of award mailed, or otherwise delivered, to the Vendor within the time specified shall create a binding contract without further action by either party.

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OSHA Compliance / Material Safety Data Sheets

- a) The article(s) covered in this bid must conform to the safety orders of the Division of Occupational Safety and Health of the State of Louisiana and the Federal Occupational Safety and Health Act, whichever is more restrictive.

Withdrawal of Bid

- a) Any Vendor may withdraw his or her bid personally or by written request at any time prior to the scheduled due date and time for receipt of bids.

Inspection / Acceptance

- a) All items provided under this bid shall be subject to inspection and test by the "District". All items must meet or exceed bid specifications, and/or, at a minimum, be merchantable per the definition of the Louisiana Commercial Code. Acceptance shall include (as applicable) complete delivery of all components, installation, training, testing, and other requirements of the contract, as verified by the "District".
- b) In case any supplies or lots of supplies are defective in material or workmanship or otherwise not in conformity with the requirements of this contract, the "District" shall have the right either to reject them or to require their correction. Supplies or lots of supplies which have been rejected or required to be corrected shall be removed, or if permitted or requested by the "District", corrected in place and at the expense of the Vendor promptly after notice, and shall not thereafter be tendered for acceptance unless the former rejection or requirement of correction is disclosed.
- c) If the Vendor fails to promptly replace or correct such supplies or lots of supplies, the "District" either (1) may, by contract or otherwise, replace or correct such supplies and charge to the Vendor the cost occasioned the "District" thereby; or (2) may terminate the contract for default as provided in the clause of the contract entitled "Default
- d) Unless the Vendor corrects or replaces such supplies within the delivery schedule, the "District" may require the delivery of such supplies at a reduction in price which is equitable under the circumstances.
- e) Except as otherwise provided in the contract, acceptance shall be conclusive except as regards latent defects, fraud, or such gross mistakes as amount to fraud.

Permits and Licenses

- a) In connection with the furnishing of materials, articles, or services listed herein, the Vendor and all of his or her employees shall secure and maintain in force such licenses and permits as are required by law.
- b) All operations, materials, handling, transportation, labeling, and production shall comply with all Federal, State, and Local laws.

Invoices and Payments

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- a) Unless otherwise specified, the Vendor shall render invoices in triplicate for materials delivered or services performed under this bid to the "District". All invoices and packing lists must reference the "District" Purchase Order number.
- b) Terms are net 30 days for the portion to be paid by the District following acceptance and satisfactory operation of network equipment and services. The "District" is not responsible for portion and payment terms as set out by the Schools & Libraries Corporation for E-Rate.

Final Conditions

- a) The complete bid packet may include, as applicable, the Request for Proposal, General Conditions, Specifications, Addenda, or other supplementary information. If the bid is transmitted or received via computer or electronic media, Vendor warrants that the bid submitted is a verbatim copy of hard copy bid on file.
- b) Any of the above shall be interpreted to include all of the provisions of the other documents as though fully set out therein. The Vendor should fully acquaint himself or herself with the conditions and terms affecting the performance of the contract.
- c) Submission of a bid shall be taken as prima facie evidence of compliance with this provision.
- d) The Vendor selected must provide the USAC Bulk Upload spreadsheets for Category Two services.
- e) The Vendor agrees that in the event any provision(s) specified herein are finally held, or determined to be, illegal or void, or as being in contravention of any applicable law, the remainder of the agreement shall remain in full force and effect.

Additional Required Forms

- a) Respondent shall execute all required certifications and forms attached to this RFP and return the signed originals with the Proposal.

Additional Documentation (Optional)

- a) Additional documents may be submitted in instances where additional documentation is needed and not already captured.

PART IV – EVALUATION CRITERIA

In accordance with IDEA policy, award(s) of a contract(s) resulting from this RFP will be made to the responsible Vendor(s)/Contractor(s) whose Proposal(s) is/are determined, after evaluation by IDEA, to be the best value to IDEA. To qualify for evaluation, a Proposal must have been submitted on time and must materially satisfy all mandatory requirements of this RFP.

1) Competitive Selection and Proposal Evaluation

This is a negotiated procurement and as such, award will not necessarily be made to the lowest priced Proposal. Award will be made to the Vendor/Contractor submitting the best responsive Proposal satisfying IDEA's requirements, price, and other factors. If one Vendor/Contractor cannot meet all of

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the requirements outlined in this document, the award may be divided among several qualified Vendors/Contractors.

Proposals will be evaluated on criteria deemed to be in IDEA's best interest, as reflected in the below evaluation rubric. An evaluation committee will review and evaluate all Proposals based on the factors detailed herein. The committee evaluating the Proposals submitted may require any or all Vendors/Contractors to give an oral presentation or be interviewed to clarify or elaborate on its Proposal. Upon completion of oral presentations, interviews, or discussions, Vendors/Contractors may be requested to revise any or all portions of its Proposal. IDEA's Board will make the final decision on whether and to whom a contract is to be awarded.

Proposals will be scored according to the following rubric:

% Weight	Evaluation Criteria
50%	E-Rate eligible costs - Calculation as per the proposal ratio to the lowest price received. While buyers should compare prices between different vendors, they should ensure that other technical factors are met first.
20%	Technical Requirements – Does the vendor meet Technical Specifications (or equivalent)? Is the Network firewall security equipment compatible with existing business operations as well as IT Infrastructure.
10%	Service Uptime Reliability - Service Provider's ability to provide the equipment to perform the required tasks to meet service uptime and reliability specifications.
20%	Risk and Security Compliance – NIST-800-207 Policy compliance
100 %	Total Possible Score

PART VI – GENERAL INFORMATION & SUPPLEMENTAL TERMS AND CONDITIONS

General Information

- a) Notice is hereby given that the IDEA Public Schools Louisiana, Inc. ("District") will accept bid proposals from qualified Vendors for computer network infrastructure, equipment, labor and materials for internal Internet connections
- b) Bids must be returned on or before the bid deadline stated on the Form 470.
- c) All work pursuant to this contract shall be contingent upon E-Rate funding. In the event of lesser funding, the "District" may accept all or parts of the proposal, at the discretion of the "District". A thirty (30) day written notice will be given to the Vendor in the event of cancellation of this RFP process by the "District". The "District" shall not be responsible for any costs, penalty, or removal charges as a result of this cancellation.
- d) It is the total responsibility of the Vendor to return bids to the "District" by the required date, time, and place.
- e) The "District" reserves the right to accept or reject any or all bids or any items therein, to waive any irregularities or informalities, and to contract in the best interests of the "District".
- f) While you are allowed to submit "value engineering" alternates, please be certain to adhere to the specifications. The base bid must follow the specifications exactly. No deviations will be allowed. All deviations in your Alternate Response shall be clearly delineated and should be proposed as

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alternates.

Please note per the "Schools and Libraries" Eligible Services List", CC Docket No. 96-45, page 33 – "Contingency Fee – In cases in which the scope of the work makes it difficult to determine the specific costs beforehand, a service provider may include a reasonable contingency fee, but only if it is a regular business practice of the service provider." Vendors may include "Contingency Fee" as a separate line item. This cost will not be included in the total Bid.

- g) Most of the campus projects contained in this RFP may have been bid and already awarded in previous E-Rate application cycles pending funding notification from the Schools and Libraries Division of USAC. The district reserves the right to perform upgrades at any and all of the campuses under any previously awarded contracts and may not elect to proceed with those campuses under this RFP.
- h) The RFP may reference specific equipment (i.e., Cisco, Tandberg, EMC, Panduit etc.). The "District" is standardized on this equipment throughout all campuses and is providing these manufacturer specific part lists as they ensure the maximum interoperability with current District infrastructure. The "District" will consider proposals for equipment or materials that are "approved equal" to the makes and models contained in this RFP. To be considered, bidders are required to provide supporting documentation that demonstrates how each substituted piece of equipment meets or exceeds the performance specifications of the equipment District is seeking.

SUPPLEMENTAL TERMS & CONDITIONS

Confidential and/or Proprietary Information: Vendor/Contractor acknowledges that, in connection with this Agreement, it may have access to or create (alone or with others) confidential and/or proprietary information that is valuable to IDEA. For purposes of this Agreement, "Confidential Information" shall include but not be limited to:

- a) Information relating to IDEA's financial, regulatory, personnel, or operational matters.
- b) Information relating to IDEA's clients, customers, beneficiaries, suppliers, donors, employees, volunteers, sponsors, or business associates and partners.
- c) Trade secrets, know-how, inventions, discoveries, techniques, processes, methods, formulae, ideas, technical data and specifications, testing, methods, research and development activities, and computer programs and designs.
- d) Contracts, product plans, sales and marketing plans, and business plans.
- e) All information not generally known outside of IDEA's business, regardless of whether such information is in written, oral, electronic, digital, or other form, and regardless of whether the information originates from IDEA or its agents.
- f) The term "Confidential Information" does not include the following:
 - i. Information available to the public through no wrongful act of the receiving party.
 - ii. Information that has been published.
 - iii. Information required in response to subpoena, court order, court ruling, or by law.

Vendor/Contractor agrees that it will not, at any time during or after termination of this Agreement, use or disclose any Confidential Information or trade secrets of IDEA to any person or entity for any purpose whatsoever without the prior written consent of IDEA, unless and except as otherwise required by applicable federal or state law or court order.

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Vendor/Contractor agrees to release to IDEA all records and supporting documentation related to the Services provided under this Agreement upon completion of the Term hereof.

Identity Theft Protection: If Vendor/Contractor will be storing employee or student data as part of the services under the Agreement, the following provisions apply:

- a) Vendor/Contractor agrees to maintain the confidentiality of “personal identifying information” and “sensitive personal information,” as those terms are defined in La R.S. § 17:3914 by implementing reasonable data security procedures, controls, and safeguards to ensure that such information is protected. Vendor/Contractor agrees that “personal identifying information will be collected only as necessary and in conjunction with this Agreement, and will be restricted in its distribution and accessibility such that only authorized representatives of Vendor/Contractor who have agreed to maintain the confidentiality of the data may access it. Such information will be properly secured by the use of safeguards such as secure file storage, firewall protection, complex password protection, secure operating systems, anti-virus software, locked physical files and backups, data encryption, and other technology tools. When necessary, “personal identifying information” and “sensitive personal information” will be disposed of through secure means, such as shredding paper files and erasing electronic files.
- b) Vendor/Contractor will not bear responsibility for safeguarding information that is (i) publicly available; (ii) that is not “personal identifying information” or “sensitive personal information”; (iii) that is obtained by Vendor/Contractor from third parties without restrictions on disclosure and is not obviously “personal identifying information” or “sensitive personal information”; or (iv) is required to be disclosed by order of a court or other governmental entity.
- c) Vendor/Contractor stipulates that this Agreement does not convey ownership of “personal identifying information” or “sensitive personal information” provided by IDEA under this Agreement.
- d) If Vendor/Contractor becomes aware of a disclosure or security breach concerning any “personal identifying information” or “sensitive personal information” covered by this Agreement, Vendor/Contractor shall immediately notify IDEA and take immediate steps to limit and mitigate the damage of such security breach to the greatest extent possible. If there is a “breach of system security” where “sensitive personal information” is breached, both as defined in La. R.S. 17:3914, Vendor/Contractor shall proceed with notification requirements as required therein. The Parties agree that any breach of the privacy and/or confidentiality obligations set forth in this Section may, at IDEA’s sole discretion, result in IDEA’s immediately terminating this Agreement without financial penalty.

Privacy of Employee or Student Data: When educational records and Student Data will be utilized under the Agreement, or Employee data may be involved, the following provisions apply and Vendor/Contractor will enter into a Data Sharing Agreement provided by IDEA:

- a) General Guidelines. The Parties acknowledge and agree that certain federal and state laws protect the privacy interests of students and parents with regard to educational records

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maintained by IDEA, including, without limitation, the Family Educational Rights and Privacy Act ("FERPA"), 20 USC § 1232g. IDEA has determined that Vendor/Contractor has a legitimate educational interest in the educational records, as that term is defined under FERPA, of IDEA's students who receive the services, and that Vendor/Contractor is the agent of IDEA solely for the purpose of providing services under this Agreement. Vendor/Contractor and its personnel shall maintain the confidentiality of Student Data, as defined below, and comply with the requirements of FERPA and all other applicable law with respect to the privacy of Student Data. Vendor's/Contractor's obligations under this Section shall survive the termination or expiration of this Agreement.

- b) Definition of "Student Data": "Student Data" includes all Personally Identifiable Information ("PII") and other non-public information and includes, but is not limited to, student data, metadata, and user content.
- c) Collection and Use of Student Data: Vendor/Contractor will only collect Student Data necessary to fulfill its duties as outlined in this Agreement. Vendor/Contractor will use Student Data only for the purpose of fulfilling its duties and providing services under this Agreement, and for improving services under this Agreement. Vendor/Contractor is prohibited from mining Student Data for any purposes other than those agreed to by the parties. Data mining or scanning of user content for the purpose of advertising or marketing to students or their parents is prohibited.
- d) If Vendor/Contractor has access to Employee PII, it shall protect PII and follow the same data protection and privacy standards as applied for Student Data.
- e) Data De-Identification: Vendor/Contractor may use de-identified Student or Employee Data for product development, research, or other purposes. De-identified Student or Employee Data will have all direct and indirect personal identifiers removed. This includes, but is not limited to, name, ID numbers, date of birth, demographic information, location information, and school ID. Furthermore, Vendor/Contractor agrees not to attempt to re-identify de-identified Student or Employee Data and not to transfer de-identified Student or Employee Data to any party unless that party agrees not to attempt re-identification.
- f) Marketing and Advertising: Vendor/Contractor will not use any Student Data to advertise or market to students or their parents.
- g) Modification of Terms of Service: Vendor/Contractor will not change how Student or Employee Data are collected, used, or shared under the terms of this Agreement in any way without advance notice to and consent from IDEA.
- h) Student Data Sharing: Student Data cannot be shared with any additional parties without prior written consent of IDEA, except as required by law.
- i) Access and Transfer or Destruction: Any Student or Employee Data held by Vendor/Contractor will be made available to IDEA upon request by IDEA. Vendor/Contractor will ensure that all Student or Employee Data in its possession and in the possession of any subcontractors or agents to which Vendor/Contractor may have transferred Student or Employee Data are destroyed or transferred to IDEA when the Student or Employee Data is no longer needed for its specified purpose, at the request of IDEA.
- j) Rights and License In and To Student or Employee Data: The Parties agree that all rights, including all intellectual property rights, shall remain the exclusive property of IDEA, and that Vendor/Contractor has a limited, nonexclusive license solely for the purpose of performing its obligations as outlined in this Agreement. This Agreement does not give Vendor/Contractor any rights, implied or otherwise, to Student or Employee Data, content, or intellectual

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property, except as otherwise expressly stated in this Agreement. This includes the right to sell or trade Student or Employee Data.

- k) Security Controls: Vendor/Contractor will store and process Student or Employee Data in accordance with industry best practices. This includes appropriate administrative, physical, and technical safeguards to secure Student or Employee Data from unauthorized access, disclosure, and use. Vendor/Contractor will conduct periodic risk assessments and remediate any identified security vulnerabilities in a timely manner. Vendor/Contractor will also have a written incident response plan, to include prompt notification of IDEA in the event of a security or privacy incident, as well as best practices for responding to a breach of PII. Vendor/Contractor agrees to share its incident response plan upon request.

PART VII – REQUIRED ATTACHMENTS

The attachments listed below are required and should be included with the Proposal.

ALL FORMS REQUIRING SIGNATURE MUST BE SIGNED AS INDICATED.

1. Attachment A – Title Page. This form must be completed and included as the cover sheet for Proposals submitted in response to this RFP.
2. Attachment B – Vendor/Contractor Information
3. Attachment C – Vendor/Contractor Certification
4. Attachment D – Proof of Insurance or Bonding
5. Attachment H – Conflict of Interest Form CIQ
6. Attachment I – Child Support Certification
7. Attachment J – Equal Opportunity and Nondiscrimination
8. Attachment K – Felony Conviction Disclosure Statement
9. Attachment L – Certification Regarding Lobbying
10. Attachment M – Debarment or Suspension Certificate
11. Attachment N – Contract Provisions for Contracts Involving Federal Funds

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12. Attachment P – Reference Sheet
13. Attachment Q – Recent and Ongoing Projects
14. Attachment R – Litigation, Terminations, Claims
15. Attachment S – Proposed Pricing
16. Attachment T – W-9 Form
17. Attachment U – Deviations and Exceptions
18. Attachment V- Independent Contractor Agreement
19. E1- Form Proposal Signature Page – Form A
20. IDEA Public Schools Louisiana, inc. Vendor Packet (Attached Separately)

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Attachment A – Title Page



A Proposal Submitted in Response to

**IDEA's Request for Proposals
#10-RFP-ECSM-0124 for E-Rate Cat 2 Consortium Louisiana – Form 470 #240001143
For IDEA Public Schools Louisiana, Inc.**

Submitted By:

(Full Legal Name of Vendor/Contractor)

On:

(Date of Proposal Submission)

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Attachment B – Vendor/Contractor Information

Vendor/Contractor Information:

1. Vendor/Contractor Legal Name: _____
2. Vendor/Contractor d/b/a (if applicable): _____
3. Employer Identification Number: _____
4. Street Address: _____
5. City, State, and Zip Code: _____

Additional Requirements:

Proposal must include name of each person with at least 25% ownership of Vendor/Contractor.

Name: _____

Name: _____

Name: _____

Name: _____

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Attachment C – Vendor/Contractor Certification and Signature Page

I, the undersigned authorized representative of Respondent, submit this Proposal and have read the specifications, which are a part of this RFP. My signature certifies that I am authorized to submit this Proposal, sign as a representative for Respondent, and carry out the services solicited in this RFP.

Signature of Authorized Representative: _____

Printed Name of Authorized Representative: _____

Title/Role of Authorized Representative: _____

Vendor/Contractor Legal Name: _____

Vendor/Contractor d/b/a (if applicable): _____

Address: _____

Telephone Number: _____

Fax Number: _____

Project Contact Person: _____

Contact Phone Number: _____

Contact Email Address: _____

Web Site Address: _____

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Attachment D – Proof of Insurance and/or Bonding

Please provide proof of insurance and/or bonding as detailed in RFP specifications.

The Vendor shall be required to agree to maintain insurance adequate for protection from claims under Worker's Compensatory Acts, and from claims for damages for personal injury, including death and damage to property, which may arise from operations under the contract. A Certificate of Insurance shall accompany the bid submission. Insurance requirements are as follows:

Commercial General Liability

General Aggregate	2,000,000
Products/completed operations aggregate	2,000,000
Personal and advertising injury	1,000,000
Each occurrence	1,000,000
Fire Damage	300,000
Medical Expense	10,000

Commercial Automobile Liability Insurance

Bodily injury (per accident)	1,000,000
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Worker's Compensation Coverage

Each accident	1,000,000
Disease – Policy Limit	1,000,000
Disease – each employee	1,000,000

A copy of Certificate of Insurance, a certificate of authority to self-insure issued by the commission, or a coverage agreement (TWCC-81, TWCC-82, TWC-83, or TWC-84), showing statutory worker's compensation insurance coverage for the person's or entity's employees providing services on a project is required for the duration of the project. Duration of the project includes the time from the beginning of the work on the project until the contractor's / person's work on the project has been completed and accepted by the school district.

The Vendor shall not allow any subcontractor, employee or agent to commence work on this contract or any subcontract until the insurance required of the Vendor, subcontractor, or agent has been obtained.

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Attachment E – Certification Regarding Drug-Free Workplace

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701 and Pursuant to 2 CFR Part 182.

The undersigned Vendor/Contractor certifies it will provide a drug-free workplace by:

- Publishing a policy statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee.
- Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, Vendor's/Contractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace.
- Providing each employee with a copy of Vendor's/Contractor's policy statement.
- Notifying the employees through Vendor's/Contractor's policy statement that as a condition of services to IDEA, employees shall abide by the terms of the policy statement and notifying Vendor/Contractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace.
- Notifying IDEA within ten (10) days of Vendor's/Contractor's receipt of a notice of a conviction of any employee; and,
- Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Legal Vendor/Contractor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

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Attachment H – Conflict of Interest Form CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session. This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a Vendor/Contractor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the Vendor/Contractor meets requirements under Section 176.006(a). By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the Vendor/Contractor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code. A Vendor/Contractor commits an offense if the Vendor/Contractor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

Respondent must fill-out the Conflict of Interest Form CIQ and submit with their Proposal.

The Conflict of Interest Form CIQ and instructions can be found at the following link:

<https://www.ethics.state.tx.us/data/forms/conflict/CIQ.pdf>

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CONFLICT OF INTEREST QUESTIONNAIRE For vendor doing business with local governmental entity		FORM CIQ
This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session. This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a). By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code. A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.		OFFICE USE ONLY Date Received
1 Name of vendor who has a business relationship with local governmental entity. <div style="border-bottom: 1px solid black; height: 1.2em; width: 100%;"></div>		
2 <input type="checkbox"/> Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)		
3 Name of local government officer about whom the information is being disclosed. <div style="border-bottom: 1px solid black; height: 1.2em; width: 100%;"></div> <div style="text-align: center; font-size: 0.9em;">Name of Officer</div>		
4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary. <div style="margin-top: 20px;"><p>A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?</p><p style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</p><p>B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?</p><p style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</p></div>		
5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.		
6 <input type="checkbox"/> Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).		
7 <div style="display: flex; justify-content: space-between; margin-top: 20px;"><div style="width: 60%;"><div style="border-bottom: 1px solid black; height: 1.2em; width: 100%;"></div><div style="font-size: 0.8em;">Signature of vendor doing business with the governmental entity</div></div><div style="width: 35%;"><div style="border-bottom: 1px solid black; height: 1.2em; width: 100%;"></div><div style="font-size: 0.8em;">Date</div></div></div>		

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Attachment L – Certification Regarding Lobbying

Submission of this certification is a prerequisite for making or entering into this transaction and is imposed by section 1352, Title 31, U.S. Code. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Any person who fails to file the required certifications shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The undersigned certifies, to the best of his or her knowledge and belief, that:

- 1) No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an office or employee of any agency, a Member of Congress, or an officer or employee of Congress, an employee of a Member of Congress, or any Board Member, officer, or employee of IDEA in connection with the awarding of 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.
- 2) 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, an employee of a Member of Congress, or any Board Member, officer, or employee of IDEA in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form –LLL, “Disclosure Form to Report Lobbying”, in accordance with its instructions.
- 3) The undersigned shall require that the language of this certification be included in the awarded documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all sub-recipients shall certify and disclose accordingly.

Legal Vendor/Contractor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

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Attachment M – Debarment or Suspension Certificate

Federal Executive Order (E.O.) 12549 “Debarment” requires that all Vendors/Contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government. By signing this document, you certify that your organization and its principals are not debarred. Failure to comply or attempts to edit this language may disqualify your bid. Information on debarment is available at <https://sam.gov/content/home>.

This certification is required by Uniform Guidance Federal Regulations implementing Executive Orders 12549 and 12689, pursuant to 2 CFR Part 200.214 and 2 CRF Part 180.

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the Vendor/Contractor is unable to certify any of the statements in this certification, Vendor/Contractor shall attach an explanation to this certification form.

Legal Vendor/Contractor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

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Attachment N – Contract Provisions for Contracts Involving Federal Funds

With respect to the use of federal funds for the procurement of goods and services, 2 CFR 200.326 and Appendix II to 2 CFR 200 require the inclusion of the following contract provisions.

1. Remedies for Contract Breach or Violations. Contracts for more than the simplified acquisition threshold currently set at \$250,000 must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms and provide for such sanctions and penalties as appropriate.
2. Termination for Cause and Convenience. All contracts in excess of \$10,000 must address termination for cause and for convenience by IDEA including the manner by which it will be affected and the basis for settlement.
3. Equal Employment Opportunity. Except as otherwise provided under 41 CFR 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR 60–1.3 must include the equal opportunity clause provided under 41 CFR 60–1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR 1964– 1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”
4. Davis-Bacon Act. When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by IDEA must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141–3144, and 3146–3148) as supplemented by Department of Labor regulations (29 CFR 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. IDEA must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. IDEA must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. IDEA must report all suspected or reported violations to the Federal awarding agency.
5. Contract Work Hours and Safety Standards Act. Where applicable, all contracts awarded by IDEA 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 (29 CFR 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of

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40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous, or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

6. *Rights to Inventions Made Under a Contract or Agreement.* If the Federal award meets the definition of “funding agreement” under 37 CFR 401.2 (a) and the recipient or subrecipient 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 subrecipient must comply with the requirements of 37 CFR 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.
7. *Clean Air Act and the Federal Water Pollution Control Act.* Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the contractor 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).
8. *Energy Efficiency Standards and Policies.* Mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6201).
9. *Debarment and Suspension.* A contract award (see 2 CFR 180.220) must not be made to parties listed on the governmentwide Excluded Parties List System 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.” The Excluded Parties List System in SAM contains 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.
10. *Byrd Anti-Lobbying.* Contractors that apply or bid for an award of \$100,000 or more must file the required certification. Each tier certifies 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 takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier.
11. *Procurement of Recovered Materials.* IDEA and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The

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requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired by the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Vendor/Contractor agrees to comply with all federal, state, and local laws, rules, regulations, and ordinances, as applicable. It is further acknowledged that the vendor certifies compliance with all provisions, laws, acts, regulations, etc. as specifically noted above.

Legal Vendor/Contractor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

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CRIMINAL HISTORY REVIEW OF VENDOR/CONTRACTOR EMPLOYEES CERTIFICATION

Please complete the information below:

I, the undersigned agent for the legal entity named below certify that [check one]:

☐ None of the employees of Vendor/Contractor and any subcontractors are “covered employees” as defined above. If this box is checked, I further certify that Vendor/Contractor has taken precautions or imposed conditions to ensure that the employees of Vendor/Contractor and any subcontractor will not become covered employees. Vendor/Contractor will maintain these precautions or conditions throughout the time the contracted services are provided.

Or

☐ Some or all of the employees of Vendor/Contractor and any subcontractor are “covered employees.” If this box is checked, I further certify that:

1. If Vendor/Contractor receives information that a covered employee subsequently has a reported criminal history, Contractor will immediately remove the covered employee from contract duties and notify the School in writing within three business days.
2. Upon request, Vendor/Contractor will provide the School with the name and any other requested information regarding covered employees so that the School may obtain criminal history record information on the covered employees.
3. If the School objects to the assignment of a covered employee on the basis of the covered employee’s criminal history record information, Vendor/Contractor agrees to discontinue using that covered employee to provide services to the School.
4. All covered employees hired after January 1, 2008 have completed the required background check process prior to performing any duties related to the School or having any direct contact with students.

I understand that non-compliance with this certification by Vendor/Contractor may be grounds for contract termination and/or barring disqualified persons from performing the work.

Legal Vendor/Contractor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

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Attachment P – Reference Sheet

Please list a minimum of three (3) verifiable references of clients/organizations (governments, charter schools or ISDs) that have used your services. IDEA Public Schools Louisiana, Inc. would prefer some of the references to be new customers in the last year, and Louisiana clients/organizations are preferred:

1.

Customer/Client School or Organization/Entity Name

Street Address

City

State

Zip

Contact Person

Phone Number

Email Address

Project Scope

Dates of Contract

2.

Customer/Client School or Organization/Entity Name

Street Address

City

State

Zip

Contact Person

Phone Number

Email Address

Project Scope

Dates of Contract

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3. _____
Customer/Client School or Organization/Entity Name

Street Address City State Zip

Contact Person Phone Number Email Address

Project Scope

Dates of Contract

4. _____
Customer/Client School or Organization/Entity Name

Street Address City State Zip

Contact Person Phone Number Email Address

Project Scope

Dates of Contract

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Attachment Q – Recent and Ongoing Projects

Respondent shall list any projects completed in the past **three** years that are similar to the scope of work in this RFP. If additional space is required, attach additional pages hereto.

1.

Customer/Client School or Organization/Entity Name

Contact Person

Phone Number

Email Address

Brief Project Scope:

2.

Customer/Client School or Organization/Entity Name

Contact Person

Phone Number

Email Address

Brief Project Scope:

3.

Customer/Client School or Organization/Entity Name

Contact Person

Phone Number

Email Address

Brief Project Scope:

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4. _____
Customer/Client School or Organization/Entity Name

Contact Person Phone Number Email Address

Brief Project Scope: _____

5. _____
Customer/Client School or Organization/Entity Name

Contact Person Phone Number Email Address

Brief Project Scope: _____

6. _____
Customer/Client School or Organization/Entity Name

Contact Person Phone Number Email Address

Brief Project Scope: _____

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Attachment R – Litigation, Terminations, Claims

Respondent shall list any project completed in the past **five years** where litigation was filed by Customer/Client or Organization/Entity against Respondent, the contract was terminated by Customer/Client or Organization/Entity before expiration of term, or insurance claims were reported against Respondent’s insurance by Customer/Client or Organization/Entity.

1.

Customer/Client School or Organization/Entity Name

Contact Person

Phone Number

Email Address

Brief Description of Event or Issues:

2.

Customer/Client School or Organization/Entity Name

Contact Person

Phone Number

Email Address

Brief Description of Event or Issues:

3.

Customer/Client School or Organization/Entity Name

Contact Person

Phone Number

Email Address

Brief Description of Event or Issues:

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4.

Customer/Client School or Organization/Entity Name

Contact Person	Phone Number	Email Address
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Brief Description of Event or Issues:

5.

Customer/Client School or Organization/Entity Name

Contact Person	Phone Number	Email Address
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Brief Description of Event or Issues:

6.

Customer/Client School or Organization/Entity Name

Contact Person	Phone Number	Email Address
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Brief Description of Event or Issues:

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Attachment S – Proposed Pricing

Respondent shall provide pricing / price schedule referencing: “ATTACHMENT “S” in its submitted Proposal.

FORM OF PROPOSAL

CLOUD NATIVE FIREWALL AS A SERVICE PLATFORM

Instructions: Bidder shall submit unit price and software developer/manufacturer product information for the specified items as listed. Unit price shall be the full unit price (USAC obligation + SBAC obligation), not accounting for the SPI billing method. The portion of the E-Rate eligible items listed below that shall be the basis of the District issued purchase order shall be determined by the USAC funding letter (extended amount of E-Rate eligible item, less USAC "discount"). Unit prices shall be inclusive of product, packaging, delivery, labor, insurance, profit, and all other services that are necessary for the proper execution and performance of contract, No other charges or surcharges shall be applicable to this contract unless specifically permitted herein. Unless as otherwise permitted and expressly stated herein, prices offered shall be firm and fixed for the term of contract.

ERATE <u>eligible</u> SKU (or equivalent)					
Item #	Description	Est Qty.	U/M	Unit Cost	Extended Amount
1	iboss Complete FWaaS Education Bundle 3 Year license, Mfg #IB-ZT-COMPLETE-FWaaS-3Y;	2,822	Each		
2	iboss FWaaS Design and Implementation Services, Mfg#: 14700-FWaaS-DESIGN-PRO-SERVICES	0	Hours		
ERATE Ineligible SKU (or equivalent)					
1	iboss Complete FWaaS Education Bundle 3 Year license, Mfg #IB-ZT-COMPLETE-FWaaS-3Y; (non-instructional)	103	Each		
3	iboss 3-year content filtering license add-on for FWaaS 3-year #iboss Content Filtering Add-On for FWaaS-3Y;	2,925	Each		
Total				\$	



“ATTACHMENT S” is available for download on [IDEA’s website](#).

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Attachment T – Respondent's W-9

The W-9 is an official form furnished by the IRS **for employers or other entities to verify the name, address, and tax identification number of an individual receiving income.** The information taken from a W-9 form is often used to generate a 1099 tax form, which is required for income tax filing purposes.

Respondent must fill-out the W-9 and submit with its Proposal. The W-9 form and instructions can be obtained at the following link: <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

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<div>Form W-9 (Rev. October 2018) Department of the Treasury Internal Revenue Service</div>	<div>Request for Taxpayer Identification Number and Certification</div> <div>► Go to www.irs.gov/FormW9 for instructions and the latest information.</div>	<div>Give Form to the requester. Do not send to the IRS.</div>																																																																		
<div>Print or type. See Specific Instructions on page 3.</div>	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.																																																																			
	2 Business name/disregarded entity name, if different from above																																																																			
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.																																																																			
	<div><input type="checkbox"/> Individual/sole proprietor or single-member LLC</div> <div><input type="checkbox"/> C Corporation</div> <div><input type="checkbox"/> S Corporation</div> <div><input type="checkbox"/> Partnership</div> <div><input type="checkbox"/> Trust/estate</div> <div><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► </div> <div>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</div> <div><input type="checkbox"/> Other (see instructions) ► </div>																																																																			
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):																																																																			
	Exempt payee code (if any) 																																																																			
	Exemption from FATCA reporting code (if any) <small>(Applies to accounts maintained outside the U.S.)</small>																																																																			
5 Address (number, street, and apt. or suite no.) See instructions.																																																																				
6 City, state, and ZIP code																																																																				
7 List account number(s) here (optional)																																																																				
<div>Part I Taxpayer Identification Number (TIN)</div> <div>Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i>, later.</div> <div>Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.</div> <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td colspan="10" style="text-align: center;">Social security number</td></tr><tr><td style="width: 25%; height: 20px;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 20px; text-align: center;">-</td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 20px; text-align: center;">-</td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td></tr><tr><td colspan="14" style="text-align: center;">or</td></tr><tr><td colspan="14" style="text-align: center;">Employer identification number</td></tr><tr><td style="width: 25%; height: 20px;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 20px; text-align: center;">-</td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 20px; text-align: center;">-</td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td><td style="width: 25%;"></td></tr></table>			Social security number														-					-					or														Employer identification number																		-					-				
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<div>Part II Certification</div> <div>Under penalties of perjury, I certify that:</div> <div>1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and</div> <div>2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and</div> <div>3. I am a U.S. citizen or other U.S. person (defined below); and</div> <div>4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.</div> <div>Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.</div> <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="width: 50%;"><div>Sign Here</div><div>Signature of U.S. person ► </div></td><td style="width: 50%;"><div>Date ► </div></td></tr></table>			<div>Sign Here</div> <div>Signature of U.S. person ► </div>	<div>Date ► </div>																																																																
<div>Sign Here</div> <div>Signature of U.S. person ► </div>	<div>Date ► </div>																																																																			
<div>General Instructions</div> <div>Section references are to the Internal Revenue Code unless otherwise noted.</div> <div>Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.</div> <div>Purpose of Form</div> <div>An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.</div> <div><ul style="list-style-type: none">Form 1099-DIV (dividends, including those from stocks or mutual funds)Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)Form 1099-S (proceeds from real estate transactions)Form 1099-K (merchant card and third party network transactions)Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)Form 1099-C (canceled debt)Form 1099-A (acquisition or abandonment of secured property)<div>Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.</div><div>If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.</div></div>																																																																				
<div>Cat. No. 10231X</div> <div>Form W-9 (Rev. 10-2018)</div>																																																																				

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Attachment U – Deviations and Exceptions

If the undersigned Vendor/Contractor intends to deviate from the specifications listed in this RFP, all such deviations must be listed on this page (and attachments as necessary), with complete and detailed conditions and information included or attached. IDEA will consider any deviation in its RFP award decisions, and IDEA reserves the right to accept or reject any Proposal based upon any deviations indicated below or in any attachments or inclusions. *Please note that deviations and variations are strongly discouraged and may be grounds for Proposal rejection at IDEA’s sole discretion.*

In the absence of any deviation entry on this form the Vendor/Contractor assures IDEA of its full compliance with the terms and conditions, specifications, and all other information contained in this RFP.

- ☐ The Respondent, named below, hereby declares and represents that it will fully comply with the terms, conditions, specifications, and other requirements set forth in this RFP without deviation and exception.
- ☐ The Respondent, named below, hereby declares and represents that it will fully comply with the terms, conditions, specifications, and other requirements set forth in this RFP except as follows:

(For additional deviations and exceptions, refer to additional pages attached herewith.)

Legal Vendor/Contractor Name: _____

Signature of Authorized Representative: _____

Date: _____

RESTRICTED

Form A E.1 Proposal Signature Page

Bid Name: E-Rate Cat 2 Consortium Louisiana		
Bid Number:		
Contract Start Date: 03/31/2024		Contract End Date: 06/30/2027
<p>The undersigned authorized representative of the bidding company indicated below hereby acknowledges:</p> <ol style="list-style-type: none">1. That he/she is authorized to enter into contractual relationships on behalf of the bidding company indicated below, and2. That he/she has carefully examined this Request For Proposal, the accompanying RFP Forms (whether in printed or electronic form), and the General Terms and Conditions and Item Specifications associated with this RFP.3. That he/she proposes to supply any products or services submitted under this Request For Proposal at the prices quoted and in strict compliance with the General Terms and Conditions, and Item Specifications associated with this RFP.4. That if any part of this bid is accepted, he/she will furnish all products or services awarded under this bid at the prices quoted and in strict compliance with the General Terms and Conditions, and Item Specifications associated with this RFP		
Name of Bidding Company	Authorized Signature	Date
Printed Name of Authorized Representative		Title
Address		
City, State, Zip		Phone
Form A		

RESTRICTED

Part VIII: APPENDICES

The appendices included in this section contain information relevant to this RFP and to the preparation of a responsive Proposal.

(The rest of this page was intentionally left blank.)

RESTRICTED

Appendix A: Vendor E-Rate Service Provider Number Requirement

IDEA would like to inform all interested vendors of the following: Service providers will be required to have an E-Rate Service Provider Number (SPIN) to access the Form 470 and to provide responses to this bid request. A SPIN may be obtained by contacting E-Rate's Customer Service, 888-203-8100."

RESTRICTED

**END OF IDEA PUBLIC SCHOOLS
LOUISIANA, INC. RFP**

IDEA PUBLIC SCHOOL LOUISIANA



VENDOR PACKET



IDEA Louisiana Headquarters

2115 W. Pike Blvd

Weslaco, Texas 78596

Phone: (956)-377-8000

Fax: (956)-447-3796

We appreciated your interest in becoming a vendor with IDEA Public Schools Louisiana. Before we can set you or your business up in our software system and do business with you, please fill out and return the vendor packet in its entirety.

Here are a few things to keep in mind:

- Does your business accept purchase orders?
- Do not perform services or fulfill any orders without an approved purchase order in place.
- IDEA Public Schools Louisiana is not responsible for materials, supplies or equipment delivered without an approved purchase order.
- IDEA Public Schools Louisiana has a 30 day net payment policy.
- IDEA Public Schools Louisiana does not pre-pay vendors for service goods.
- Do not over ship or substitute items from the original purchasing order unless pre-approved by the Purchasing or Accounts Payable Supervisor.
- Invoices must be rendered on the date of complete shipment of all materials/items on the purchase order. Separate billing for partial shipments is not allowed unless other arrangements have been done with the Purchasing or Accounts Payable Supervisor.
- IDEA Public Schools will verify if your business has been debarred or suspended on www.sam.gov.
- IDEA Public Schools will verify information on your W9 with the IRS website for TIN matching.
- All invoices should be sent to payableLA@ideapublicschools.org for processing.

For questions, please contact:

ipsvendorinquiry@ideapublicschools.org.

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the
requester. Do not
send to the IRS.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
6 City, state, and ZIP code	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
				-			-			
or										
Employer identification number										
				-						

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign
Here

Signature of
U.S. person ►

Date ►

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 28% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.



IDEA Public Schools
VENDOR MAINTENANCE FILE

Approval to add Vendor to IDEA list

Vendor no. assigned

☐ New Vendor (check one)
☐ Revision to Vendor File

Name: _____
Attention: _____
Address: _____
City: _____
State: _____ Zip Code _____
Telephone: _____
Fax: _____

Remit to Address (if different)

Contact: _____
Address: _____
City: _____
State: _____ Zip Code _____
Alt. Phone: _____
Email: _____

Vendor's Identification Number

[] Individual's Social Security Number _____ i.e. (123-45-6789)
Business / Company's Employer I.D. # _____ i.e. (74-1234567)
Is this business / company / entity incorporated? _____ (Circle one)

We pay this vendor for the following (Check as many as applicable,)

Purchase Goods (Explain Products) _____

[] Rent Products, equipment, etc.
[] Medical Payments
[] Personal Services (repairs, consultants, other services, etc.)
Employee Reimbursements
[] Travel Related (mileage, meals, hotels, taxi, plane fare, conference fees, etc)

Form 1099: Box 1
Form 1099: Box 6
Form 1099: Box 7

Requested by: _____
signature

_____ Date

Business Office Use Only

	Signature	Date
Approved by		
Posted by		

1099 Vendor: YES / NO (Circle One)
IF YES: 1099 BOX NO.

*** TYPE OR PRINT ***

Vendors will not be added on system without an email or phone number provided.

All sections of this form must be filled out in order to process

Submit forms to IDEA Purchasing Department:
ipsvendorinquiry@ideapublicschools.org



ACH Vendor Payment Enrollment Form

(Only for use with banks within the United States)

This form authorizes IDEA Public Schools to make payments to a business or individual electronically. It is the responsibility of the vendor to notify IDEA Public Schools of pertinent payee or company information and or bank account changes in writing. IDEA Public Schools shall be entitled to rely on the authorization herein until it receives 45 days written notice of any change from the vendor. **Please type or print.**

Section 1: Payee / Company Information

Vendor Name: _____

Social Security Number or Employer Identification Number: _____

Phone Number: _____

Mailing Address: _____ City _____ State _____ Zip _____

Email: _____

(*This is mandatory to send payment confirmation notification to vendor when payments are initiated by

IDEA Accounts Payable Department via Tyler Muni s system.)

Section 2: Account Information (For Accuracy Provide Voided Check)

☐ Personal Account

☐ Business Account

Bank Name: _____

Bank Address: _____ City _____ State _____ Zip _____

Bank Routing Number: _____ (must be 9 digits)

Vendor Bank Account Number: _____ Checking ☐ Savings ☐

Section 3: Authorization

Authorized Signature

Print Name

Title

Date

Section 4: Submit Information to

IDEA Public Schools Louisiana
2215 W. Pike Blvd
Weslaco, TX 78596
Phone: 956-377-8000
Fax: 956-447-3796

Email: _____

ipsvendorinquiry@ideapublicschools.org



IDEA Louisiana Headquarters

2115 W. Pike Blvd

Weslaco, Texas 78596

Phone: 956-377-8000

Fax: 956-447-3796

CONFLICT OF INTEREST:

Before IDEA Public Schools Louisiana can set you or business up as one of our approved vendors, we require a Conflict of Interest form to be completed. Fill out the attached form and return it as part of your completed vendor packet. This form is required in order to comply with the Louisiana government's conflict of interest law.

For questions, please contact:

ipsvendorinquiry@ideapublicschools.org

- If not related to an IDEA Public Schools employee-write your name or business name and N/A in box 1.
- If related to an IDEA Public Schools employee-fill out the form entirely. List the name of the Idea Public Schools employee you are related to in box 3 and your relationship to the person in Section D.
- Be sure to sign and date the form.

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes

☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes

☐ No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;
or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

- (a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

- (a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

- (2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

Criminal History Review of Contractor Employees

La R.S. 15:587 requires entities that contract with school districts or charter schools to provide services to obtain named based criminal history and/or fingerprinting record information regarding “covered employees.”

Definitions:

“*Covered Employees*”: Any employee of a contractor or subcontractor who (1) has or will have continuing duties related to the contracted services and (2) has or will have direct contact with students. IDEA Public Schools Louisiana, Inc. retains the discretion to determine what constitutes direct contact with students.

“*Disqualifying Criminal History*”: Any conviction or other criminal information designated by IPSL, including any offense enumerated in La R.S. 15:587.1

Any contractor seeking to enter into a service agreement with IPSL must comply with the requirements of La R.S. 15:587 by working with the Louisiana State Police to conduct fingerprint checks on employees prior to beginning services. Contractors who fail to follow this process will not be allowed to provide services to IPSL.

CRIMINAL HISTORY REVIEW OF CONTRACTOR EMPLOYEES

Please complete the information below:

I, the undersigned agent for _____ (“Contractor”), certify that [check one]:

☐ None of the employees of Contractor and any subcontractors are “covered employees” as defined above. If this box is checked, I further certify that Contractor has taken precautions or imposed conditions to ensure that the employees of Contractor and any subcontractor will not become covered employees. Contractor will maintain these precautions or conditions throughout the time the contracted services are provided.

Or

☐ Some or all of the employees of Contractor and any subcontractor are “covered employees.” If this box is checked, I further certify that:

1. Contractor has obtained all required criminal history and/or fingerprinting record information regarding its covered employees through the Louisiana State Police as required by law.
2. If Contractor receives information that a covered employee subsequently has a reported criminal history, Contractor will immediately remove the covered employee from contract duties and notify IPSL in writing within three business days.
3. Upon request, Contractor will provide IPSL with the name and any other requested information regarding covered employees so that IPSL may obtain criminal history record information on the covered employees.
4. If IPSL objects to the assignment of a covered employee on the basis of the covered employee’s criminal history record information, Contractor agrees to discontinue using that covered employee to provide services to IPSL.
5. All covered employees hired after January 1, 2008, have completed the required background check process prior to performing any duties related to IPSL or having any direct contact with students.

I understand that non-compliance with this certification by Contractor may be grounds for contract termination and/or barring disqualified persons from performing the work.

Signature of Contractor Official

Date