



RFP 33.22

USI Southwest Inc.

Supplier Response

Event Information

Number: RFP 33.22
Title: Consulting & Related Services
Type: Request for Proposal
Issue Date: 5/2/2022
Deadline: 6/1/2022 03:00 PM (CT)
Notes: The Educational Purchasing Interlocal Cooperative at Region 6 (EPIC6) seeks proposals for Consulting & Related Services on an "as needed" basis for the period of July 1, 2022 thru June 30, 2023 with an option to renew annually for an additional two (2) years if agreed upon by EPIC6 and the vendor.

This Request for Proposal (RFP) is solicited on behalf of EPIC6 Purchasing Coop and its members. Awarded vendor(s) must agree to extend contract pricing and terms to all members, current and future, as agreed to by the Cooperative in this contract. **Volumes and quantities that will be purchased are unknown.** Cooperative members are not required to purchase from awarded vendors. EPIC6 will be awarding this contract on a multi-vendor basis, so as to best serve the needs of its Cooperative members. EPIC6 seeks to award responsive, responsible proposals that score the minimum evaluation score of 80 points thus allowing the Cooperative members access to vendors that best meet their needs based on factors including, but not limited to, price, availability, and delivery. Awards resulting from this solicitation will designate the vendor(s) as an "approved vendor(s)" with the Cooperative and its members. Any reference within the following pages of this document to bid, Request for Proposal (RFP), Competitive Sealed Proposal (CSP) could be technically inaccurate but should still be construed to mean and are used interchangeably as the designated legal methods of procurement listed at TEC 44.031(a)(3). This is a Request for

Contact Information

Contact: Matthew Reddoch
Address: 3332 Montgomery Rd.
Huntsville, TX 77340
Phone: (936) 4358288
Fax: (936) 4358263
Email: mreddoch@esc6.net

USI Southwest Inc. Information

Address: 303 N. Oregon St.
Suite 310
El Paso, TX 79901
Phone: (915) 534-9457
Fax: (866) 494-6822
Web Address: www.usi.com

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

Phillip Briscoe

Signature

Submitted at 5/23/2022 11:08:35 AM

Phillip.Briscoe@usi.com

Email

Requested Attachments

Proposed Goods and Services

Region 6 ESC - RFP 33.22 USI Proposal.pdf

Please upload one or more documents or sheets describing your offerings, line cards, catalogs, links to offerings OR list links to your offerings that illustrate the catalog of proposed lines of goods and or services you carry and offer under this proposal. It does not have to be exhaustive but should, at a minimum tell us what you are offering. It could be as simple as a sheet with your link to your online catalog of goods and services.

Pricing Sheet

Price Consideration.pdf

Please upload a list of proposed prices for any or all key products or services your company provides.

D/M/WBE Certification

No response

D/M/WBE Certification documentation may be scanned and uploaded if you desire to claim your status as one of the identified enterprises. (Disadvantaged Business Enterprise, Minority Business Enterprise and/or Woman Business Enterprise) If vendor has more than one certification scan into one document. (PDF Format ONLY)
DO NOT UPLOAD encrypted or password protected files.

Company Logo

USI Logo_RGB.jpg

If you desire, please upload your company logo that could be used on the EPIC6 website.

Preferred Logo Format: 300 x 225 px - .png, .eps, .jpeg

Current W-9 Tax Form

USI SW - W9.pdf

You are required by EPIC6 to upload a current W-9 Internal Revenue Service (IRS) Tax Form for your entity. This form will be utilized by EPIC6 to properly identify your entity.

Response Attachments

USI Public Entity References - 2022.pdf

USI References

Bid Attributes

1 Company and/or Product Description

This information will appear on the EPIC6 website, if awarded an EPIC6 contract. (Limit 750 characters.)

From many great individuals USI has become one unique industry leader. USI began in 1994 with a single office of \$6.5 million of revenue and 40 associates. Today, USI is approaching \$2 billion in revenue with more than 8,000 associates in approximately 200 offices across the country.

USI has served over 500,000 clients meeting their property & casualty, employee benefit, personal risk and retirement needs nationwide. We have more than 150 years of consulting and brokerage experience through our acquired agencies, with local offices dating back in their communities as far as the late 1800s. USI combines industry leading national capabilities delivered through longstanding, passionate and committed local service teams.

2 Primary Contact Name

Phillip Briscoe

3 Primary Contact Title

Broker

4 Primary Contact Email

Phillip.Briscoe@usi.com

5 Primary Contact Phone

Enter 10 digit phone number.

(915) 534-9412

6 Secondary Contact Name

Jim Brundage

7 Secondary Contact Title

Vice President

8 Secondary Contact Email

Jim.Brundage@usi.com

9 Secondary Contact Phone

Enter 10 digit phone number.

(915) 534-9457

10 Company Website

This will appear on the EPIC6 website, if awarded an EPIC6 contract.

www.usi.com

11 Federal ID Number

Federal ID Number also known as the Employer Identification Number. (Format 12-3456789)

76-0206321

1 2	Primary Address 303 N. Oregon St., Suite 310
1 3	Primary Address City El Paso
1 4	Primary Address State Abbreviation acceptable. TX - Texas
1 5	Primary Address Zip Code 79901
1 6	Subsidiaries Please list all subsidiaries or other included companies of your company that will be included in this bid submission. If no subsidiaries, please respond "none". None
1 7	Historically Underutilized Business Historically Underutilized Business - HUB (Required by some participating governmental entities) Vendor certifies that their firm is a HUB as defined by the State of Texas at https://comptroller.texas.gov/purchasing/vendor/hub/ or in a HUBZone as defined by the US Small Business Administration at https://www.sba.gov/offices/headquarters/ohp Proof of one or both may be submitted. Vendor must upload proof of certification to the "Response Attachments" section. (Yes, a HUB vendor or No, not a HUB vendor) No
1 8	Years Experience Company years experience in this category? 89
1 9	Discount Offered What is the MINIMUM percentage discount off of any item or service you offer to EPIC6 Members that is in your regular catalog, website, store or shelf pricing? This is a ceiling on your pricing and not a floor because, in order to be more competitive in the individual circumstance, you may offer a larger discount depending on the items or services purchased and the quantity at time of sale. Must answer with a number between 0% and 100%. Failure to enter a number for the discount shall be interpreted as a 0% discount. 0%
2 0	Large Order Discount Do you offer additional discounts to EPIC6 members for large order quantities or large scope of work? (Yes/No) No
2 1	Contract Pricing Vendor agrees to honor the pricing discount off regular catalog, website, store or shelf pricing for the term of the award? (Yes / No) No

2
2**Contract Pricing Notation**

If vendor requires a reference number or special notation on the purchase order to assure EPIC6 contract pricing, please list. If none is required, please respond with "n/a".

2
3**Minimum Order Restrictions**

Does your company require a minimum order? If so, please specify. If a minimum order is not required, please respond "no".

In addition, please specify any additional charge for orders received for less than the minimum amount.

2
4**Restocking Fee**

Does your company charge a restocking fee on returned items? If so, please specify. If not, please respond "no".

2
5**Delivery**

Delivery of items purchased is typically no more than _____ working days after receipt of an EPIC6 member's authorized order. (Number of days)

2
6**EPIC6 Cooperative Member List**

Awarded vendor(s) must agree to extend EPIC6 contract pricing and terms to all current and future members.

Current members of EPIC6 are listed here http://epic6.net/272253_2

Volumes and quantities that will be purchased are unknown. Cooperative members are not required to purchase from awarded vendors. EPIC6 will be awarding this contract on a multi-vendor basis, so as to best serve the needs of its Cooperative members.

I certify that I agree to extend contract pricing to all current and future EPIC6 members. (Yes / No)

2
7**EPIC6 Administration Fee**

By submitting a proposal, I understand that if awarded an EPIC6 contract, a 1.5% administration fee will be charged for all goods and services provided under said contract. The fee shall be remitted to EPIC6. The fee shall not and will not be added by the vendor as a separate line item on an EPIC6 member invoice, quote, proposal or any other written communications with the EPIC6 member. EPIC6/ESC Region 6 is required by Texas Government Code § 791 to be compensated for its work and thus, failure to agree shall render your response void and it will not be considered. Vendor agrees to remit to EPIC6 the required administration fee? Please respond "Yes"

2
8**Admin Fee Contact Name**

Admin Fee Contact Name. This person is responsible for paying the admin fee to EPIC6.

2
9**Admin Fee Contact Email**

30	Admin Fee Contact Phone Enter 10 digit phone number. (915) 534-9412
31	Authorized Proposer I certify that I am authorized to answer the questions in this section entitled, "Required Federal Contract Provisions of Federal Regulations for Contracts" for contracts with Educational Purchasing Interlocal Cooperative Region 6 (EPIC6) for the proposing company. (Yes / No) Yes
32	Certification of Residency Required by the State of Texas The vendor's ultimate parent company or majority owner: (A) has its principal place of business in Texas; OR (B) employs at least 500 persons in Texas? (Yes / No) Yes
33	Company Residence (City) Vendor's principal place of business is in the city of? El Paso
34	Company Residence (State) Vendor's principal place of business is in the state of? TX
35	Right of Refusal Does the proposing vendor wish to reserve the right not to perform under the awarded agreement with an EPIC6 member at vendor's discretion? No
36	Non-Collusive Bidding Certificate By submission of this bid or proposal, the Bidder certifies that: 1) This bid or proposal has been independently arrived at without collusion with any other Bidder or with any Competitor. 2) This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids, or proposals for this project, to any other Bidder, Competitor or potential competitor. 3) No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal. 4) The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the Bidder as well as to the person signing in its behalf. Not a negotiable term. Failure to agree will render your proposal non-responsive and it will not be considered. (Agree) Agree

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Regulatory Standing

I certify to EPIC6 for the proposal attached that my company is in good standing with all governmental agencies Federal or state that regulate any part of our business operations. If not, please explain. (Yes / No)

Yes

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Antitrust Certification Statements (Tex. Government Code § 2155.005)

By submission of this bid or proposal, the Bidder certifies that:

I affirm under penalty of perjury of the laws of the State of Texas that:

- 1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, or partnership.
- 2) In connection with this bid, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15.
- 3) In connection with this bid, neither I nor any representative of the Company has violated any federal antitrust law.
- 4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company. (Agree)

Agree

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Suspension or Debarment Certification Debarment and Suspension (Executive Orders 12549 and 12689)

A contract award (2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions 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. By submitting this offer and certifying this section, this bidder: Certifies that no suspension or debarment is in place. (Certify by a YES answer)

Yes

40

Non-Discrimination Statement and Certification

In accordance with Federal civil rights law, all U.S. Yes Departments, including the U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident. Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotope, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English. To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at How to File a Program Discrimination Complaint and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov. (Title VI of the Education Amendments of 1972; Section 504 of the Rehabilitation Act of 1973; the Age Discrimination Act of 1975; Title 7 CFR Parts 15, 15a, and 15b; the Americans with Disabilities Act; and FNS Instruction 113-1, Civil Rights Compliance and Enforcement – Nutrition Programs and Activities) All U.S. Departments, including the USDA are equal opportunity provider, employer, and lender. Not a negotiable term.

Failure to agree will render your proposal non-responsive and it will not be considered. I certify that in the performance of a contract with EPIC6 or its members, that our company will conform to the foregoing anti-discrimination statement and comply with the cited and all other applicable laws and regulations. (Agree)

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Indemnification

The ESC Region 6 and EPIC6 is a Texas Political Subdivision and a local governmental entity; therefore, is prohibited from indemnifying third parties pursuant to the Texas Constitution (Article 3, Section 52) except as specifically provided by law or as ordered by a court of competent jurisdiction. A provision in a contract to indemnify or hold a party harmless is a promise to pay for any expenses the indemnified party incurs, if a specified event occurs, such as breaching the terms of the contract or negligently performing duties under the contract. Article III, Section 49 of the Texas Constitution states that "no debt shall be created by or on behalf of the State ... " The Attorney General has counseled that a contractually imposed obligation of indemnity creates a "debt" in the constitutional sense. Tex. Att'y Gen. Op. No. MW-475 (1982). Contract clauses which require the System or institutions to indemnify must be deleted or qualified with "to the extent permitted by the Constitution and Laws of the State of Texas." Liquidated damages, attorney's fees, waiver of vendor's liability, and waiver of statutes of limitations clauses should also be deleted or qualified with "to the extent permitted by the Constitution and laws of State of Texas." Not a negotiable term. **Failure to agree will render your proposal non-responsive and it will not be considered.** Do you agree to these terms? (Yes / No)

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Texas HB 89- Texas Government Code Sec. 2270.002

A governmental entity may not enter into a contract with a company for goods or services unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. I verify by my "YES" response to this attribute that, as a company submitting a proposal to this solicitation, that I am authorized to respond for the company and affirm that the company (1) does not boycott Israel; and (2) will not boycott Israel during the term of this contract, or any contract with EPIC6 in the future. I further affirm that if our company's position on this issue is reversed and this affirmation is no longer valid, that EPIC6 will be notified in writing within one (1) business day and we understand that our company's failure to affirm and comply with the requirements of Texas Government Code 2270 et seq. shall result in a "no award" determination by EPIC6 and if a contract exists with EPIC6, be grounds for immediate contract termination without penalty to EPIC6 and the Education Service Center Region 6. **FAILURE TO RESPOND "YES" WILL RESULT IN NO CONSIDERATION OF YOUR PROPOSAL.** I swear and affirm that the above is true and correct by a "YES" response.

4
3**Do you want EPIC6 members to be able to spend Federal grant funds with you if awarded?**

Most of our members receive Federal Government grants and they make up a significant portion of their budgets. The members need to know if your company is willing to sell to them when they spend federal budget funds on their purchase. There are attributes that follow that are provisions from the federal regulations in 2 CFR part 200. Your answers will determine if your award will be designated as Federal or Education Department General Administrative Regulations (EDGAR) compliant. Is it your intent to be able to sell to EPIC6 members regardless of the fund source, whether it be local, state or federal? (Yes / No)

4
4**2 CFR PART 200 Contract**

Contracts for more than the simplified acquisition threshold currently set at \$250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Notice: Pursuant to the above, when federal funds are expended by ESC Region 6 and EPIC6 Members, ESC Region 6 and EPIC6 Members reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

Does vendor agree?

4
5**2 CFR PART 200 Termination**

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

Pursuant to the above, when federal funds are expended by ESC Region 6 and EPIC6 Members, ESC Region 6 and EPIC6 Members reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process for cause after giving the vendor an appropriate opportunity and up to 30 days, to cure the causal breach of terms and conditions. ESC Region 6 and EPIC6 Members reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process for convenience with 30 days notice in writing to the awarded vendor. The vendor would be compensated for work performed and goods procured as of the termination date if for convenience of the ESC Region 6 and EPIC6 Members. Any award under this procurement process is not exclusive and the ESC Region 6 and EPIC6 reserves the right to purchase goods and services from other vendors when it is in the best interest of the ESC Region 6 and EPIC6.

Does vendor agree?

4
6**2 CFR PART 200 Clean Air Act**

Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and subgrants of amounts in excess of \$250,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

Pursuant to the Clean Air Act, et al above, when federal funds are expended by ESC Region 6 and EPIC6 Members, ESC Region 6 and EPIC6 Members requires that the proposer certify that during the term of an award by the ESC Region 6 and EPIC6 Members resulting from this procurement process the vendor agrees to comply with all of the above regulations, including all of the terms listed and referenced therein.

Does vendor agree?

4
7**Federal Rule**

Compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15). (Contracts, subcontracts, and subgrants of amounts in excess of \$250,000)

Pursuant to the above, when federal funds are expended by ESC Region 6 and EPIC6 Members, ESC Region 6 and EPIC6 Members requires the proposer certify that in performance of the contracts, subcontracts, and subgrants of amounts in excess of \$250,000, the vendor will be in compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15).

Does vendor certify that it is in compliance with the Clean Air Act?

4
8**2 CFR PART 200 Byrd Anti-Lobbying**

Byrd Anti-Lobbying Amendment (31 U.S.C. Yes Amendment 1352)—Contractors that apply or bid for an award exceeding \$100,000 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 up to the non-Federal award.

Pursuant to the above, when federal funds are expended by ESC Region 6 and EPIC6 Members, ESC Region 6 and EPIC6 Members requires the proposer certify that during the term and during the life of any contract with ESC Region 6 and EPIC6 Members resulting from this procurement process the vendor certifies to the terms included or referenced herein.

Does vendor agree?

4
9**2 CFR PART 200 Procurement of Recovered Materials**

A non-Federal entity that is a state agency or agency of a Materials political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 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 during 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.

Does vendor certify that it is in compliance with the Solid Waste Disposal Act as described above?

50

2 CFR PART 200 Rights to Inventions

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 Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

Pursuant to the above, when the foregoing applies to ESC Region 6 and EPIC6 Members, Vendor certifies that during the term of an award resulting from this procurement process, Vendor agrees to comply with all applicable requirements as referenced in the Federal rule above.

Does vendor agree?

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2 CFR PART 200 Ban on Foreign Telecommunications

Federal grant funds may not be used to purchase equipment, services, or systems that use “covered telecommunications” equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. “Covered telecommunications” means purchases from Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities), and video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).

Pursuant to the above, when federal funds are expended by ESC Region 6 and EPIC6 Members, Vendor certifies that Vendor will not purchase equipment, services, or systems that use “covered telecommunications”, as defined by 2 CFR §200.216 equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

Does vendor agree?

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2 CFR PART 200 Domestic Preferences for Procurements

As appropriate and to the extent consistent with law, the non-Federal entity should, to the greatest extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this award. For purposes of 2 CFR Part 200.322, “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States. Moreover, for purposes of 2 CFR Part 200.322, “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum, plastics and polymer-based products such as polyvinyl chloride pipe, aggregates such as concrete, class, including optical fiber, and lumber.

Pursuant to the above, when federal funds are expended by ESC Region 6 and EPIC6 Members, Vendor certifies that to the greatest extent practicable Vendor will provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

Does vendor agree?

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Certification Regarding Lobbying

Applicable to Grants, Sub-grants, Cooperative Agreements, and Contracts Exceeding \$100,000 in Federal Funds

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 certification 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 officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.

(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, or an employee of a Member of Congress 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 award 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.

(Please answer I HAVE or I HAVE NOT Lobbied per above)

I have not

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Subcontracting

2 CFR §200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

Do you ever anticipate the possibility of subcontracting any of your work under this award if you are successful?

IF NO, DO NOT ANSWER THE NEXT ATTRIBUTE QUESTION. . IF YES, and ONLY IF YES, you must answer the next question YES if you want an EPIC6 Member to be authorized to spend Federal Grant Funds for Procurement.

No

55 Subcontracting Part 2 (Only If Yes to previous question)

If your response to the above attribute (#54) was yes, do you agree to comply with the following federal requirements?

(a) The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:

(1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce ; and

(6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

N/A

56 Felony Conviction Notice

I certify that the information concerning notification of felony conviction has been reviewed by me and the information furnished is true to the best of my knowledge. State of Texas Legislative Senate Bill No.1, Section 44.034, Notification of Criminal History, Subsection (a), states "a person or business entity that enters into a contract with a school district or EPIC6 must give advance notice to the district or EPIC6 if the person, owner, or operator of the business entity has been convicted of a felony". The notice must include a general description of the conduct resulting in the conviction of a felony. Subsection (b) states, " a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by subsection (a) or misrepresented the conduct resulting in the conviction". The district must compensate the person or business entity for services performed before the termination of the contract. This notice is not applicable of a publicly-held corporation.

57 Publicly Held Corporation

My firm is a publicly held corporation; therefore, this reporting requirement is not applicable? (Yes / No)

No

58 Owner(s)

My firm is owned or operated by individual(s) who has/have been convicted of a felony? (Yes / No)

No

59 Details of Conviction

If your firm is owned or operated by the following individual(s) who has/have been convicted of a felony: Please provide details of the conviction. This is not necessarily a disqualifying factor and the details of the conviction determines the eligibility. Providing false or misleading information about the conviction is illegal. Please respond "n/a" if not applicable.

N/A

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Certification of Terms and Conditions

I certify that I have read, understand and agree to the EPIC6 Terms and Conditions. (attachment)
(Yes / No)

Yes

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Solicitation Exceptions/Deviations

If the bidder intends to deviate from the EPIC6 Terms and Conditions attached in this proposal invitation, all such deviations must be listed on this attribute, with complete and detailed conditions and information included or attached. EPIC6 will consider any deviations in its proposal award decisions, and EPIC6 reserves the right to accept or reject any bid based upon any deviations indicated below or in any attachments or inclusions. In the absence of any deviation entry on this attribute, the proposer assures EPIC6 of their full compliance with the Standard Terms and Conditions contained in this Solicitation.

N/A

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References

Please provide three (3) references, preferably from school districts or other governmental entities who have used your services within the last three (3) years. Additional references may be required. Please provide the entity name, contact person, email address and phone number.

Region 19 ESC, Rebecca Hernandez, rshernandez@esc19.net, 915-780-5021
Socorro ISD, Rene Vargas, rvarga03@sisd.net, 915-937-0101
Canutillo ISD , Martha Carrasco, mcarrasco@canutillo-isd.org, 915-877-7423

Evaluation Criteria

Proposer scoring 80% or above will be considered for a contract award. The following is the evaluation criteria assigned to this RFP:

1. **Purchase Price:** (30) point weight per prices as determined by EPIC6 on a variety of randomly selected items and/or discount percent.
2. **The reputation of the vendor and of the vendor's goods or services;** (5) point weight. Based on references or other information known to EPIC6.
3. **The quality of the vendor's goods or services;** (20) point weight. References or EPIC6 staff knowledge or any other information known or available through the RFP or otherwise to EPIC6.
4. **The total long-term cost to the EPIC6 member to acquire the vendor's goods or services;** (3) point weight.
5. **Extent to which the Goods or Services meet the Needs:** (20) point weight. The extent to which goods and services meet EPIC6/EPIC6 member needs.
6. **Vendor's Past Relationship :** (10) point weight - Vendor's past relationship with EPIC6 and/or EPIC6 members. Only experience within the past 5 years will be evaluated unless otherwise specified. Poor relationship = 0 points; no past relationship = 5 points; good relationship= 10 points.
7. **Impact on the Ability of the EPIC6 member to Comply with Laws and Rules Relating to Historically Underutilized Businesses (HUB):**
(1) point weight – Points are assigned if the vendor agrees to abide by the federal regulations in the Attribute #51 and OR #52 if applicable, of this solicitation, related to underutilized businesses in its subcontracting practices, when applicable. NOTE: Failure to agree to comply with the federal regulations herein shall make use of federal funds to purchase the goods or services proposed unallowable.
8. **Residency:** (1) point weight - for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner:
(A) has its principal place of business in this state; or
(B) employs at least 500 persons in this state.
9. **Experience:** (10) point weight - Attribute #18: 0-2 years = 1 point; 2-5 years = 5 points; 5-10 years = 8 points; >10 years = 10 points.

General Purchasing Requirements

GENERAL REQUIREMENTS APPLY TO ALL PURCHASES. HOWEVER, THESE MAY BE SUPERSEDED, IN WHOLE OR IN PART, BY THE SCOPE, SPECIAL REQUIREMENTS, SPECIFICATIONS, OR OTHER DATA CONTAINED HEREIN. Read this entire document carefully. Follow all instructions. Vendor is responsible for fulfilling all requirements and specifications.

1. **SUPPLEMENTAL MATERIALS** Seller is responsible for including all pertinent product data in the returned proposal/bid packet or an active link to access. Literature, brochures, data sheets, specification information, completed forms requested as part of the bid/proposal package and any other pertinent information that may affect the evaluation and award should be included. Materials such as legal documents and contractual agreements, which the Seller wishes to include as a condition of the bid/proposal, must also be included in the submitted packet. Failure to include all necessary and proper supplemental materials may be cause to reject the entire packet.
2. **INSTALLATION** When installation is specified in the packet, the Seller shall provide the following services and meet or exceed the requirements at no additional cost above the initial proposal/bid price on machinery or furniture:
 - a. Provide transportation of the items to physical destination as noted in packet.
 - b. Deliver items to proper location at physical destination.
 - c. Complete assembly and adjustments by trained installation mechanic.
 - d. Remove all packing/shipping materials. All materials, equipment, and labor necessary to fully assemble furniture or machinery must be provided by Seller. Machinery must be made ready for electrical and/or fluid service connection. Following

proper connection, machine must be tested and deemed acceptable by both the Seller and the Buyer.

3. **WARRANTY - PRODUCT** Seller shall not limit or exclude any implied or express warranties. Any attempt to do so shall render this contract null and void at the option of the Buyer. Seller warrants that: a. The goods to be delivered hereunder shall be in full conformity to the specifications, drawings, and descriptions listed in the packet, and to the sample(s) furnished by Seller, if any. Further, it is agreed that this warranty shall survive acceptance of delivery and payment for the goods and that the Seller agrees to bear the cost of inspecting and/or testing all goods rejected. b. That the goods to be delivered hereunder will not infringe on any valid patent, trademark, trade-name, or copyright, and that the Seller will, at no expense to the Buyer, defend any and all actions or suits charging such infringement against the Buyer, its agents and/or employees, in the event of any action or suit. c. That the goods to be delivered hereunder will be manufactured, sold, and/or installed in compliance with the provisions of all applicable Federal, State, and Local laws, ordinances, statutes, regulations, and/or policies. d. That nothing contained herein shall exclude or affect the operation of any implied warranties otherwise arising in favor of the Buyer. e. In event of conflict between specifications, drawings, and descriptions, the specifications shall govern.

4. **SAFETY – WARRANTY** Seller warrants that the product sold to Buyer shall conform to the standard promulgated by the U.S. Department of Labor under the Occupational Safety and Health Act of 1970. In the event the product does not conform to OSHA standards, Buyer may return the product for correction or replacement at the Seller's expense. The "Hazardous Communications Act", commonly known as the "Texas Right to Know Act", states that a Seller must provide to the Buyer, with each delivery, material safety data sheets as is applicable to hazardous substances defined in the Act.

5. **RIGHT OF INSPECTION** Buyer shall have the right to inspect the goods at delivery point before accepting them. The Buyer reserves the right to: a. Inspect articles delivered and to return those which do not meet specifications or reasonable standards of quality. b. Reject articles shipped contrary to instructions or in containers which do not meet recognized standards. c. The Buyer may return rejected articles or excess merchandise (or may hold the articles subject to the Seller's order) and may, at Seller's risk and expense, in either event, charge Seller with the cost of shipping, unpacking, inspecting, re-packing, re-shipping, and other like expenses. The Buyer also reserves the right to requirements and needs of the Buyer.

6. **MODIFICATIONS** This contract can be modified or rescinded only by a written document signed by both parties or their duly-authorized agents.

7. **APPLICABLE LAW** This agreement shall be governed by the laws of the State of Texas without regard for any conflict of laws provisions and the Uniform Commercial Code.. Whenever the term "Uniform Commercial Code" is used it shall be construed as meaning the laws of the State of Texas without regard to any conflict of laws provisions and the Uniform Commercial Code as adopted in the State of Texas as effective and in force on the date of this agreement.

8. **CHOICE OF LAW / VENUE** Both parties agree that the venue for litigation arising from this contract between EPIC6 and the proposer shall be in Huntsville, Walker County, Texas. Venue for litigation arising from this contract with an EPIC6 member shall lie in the county and state of the member.

9. **SEVERABILITY** If any section, subsection, paragraph, sentence, clause phrase, or word of these specifications shall be held invalid, such holding shall not affect the remaining portions of these specifications and it is hereby declared that such remaining portions would have been included in these specifications as though the invalid portion had been omitted.

10. **HOLD HARMLESS** Seller shall indemnify and hold Education Service Center, Region 6, EPIC6, and any EPIC6 member harmless for all claims of personal injury, death, and or property damage rising from any and all causes whatsoever, resulting directly or indirectly from Seller's performance. Seller shall procure and maintain, in respect to the subject matter of this bid, appropriate insurance coverage including, as a minimum, vehicle, public liability and property damage with adequate limits to cover Seller's liability as may arise directly or indirectly from work performed under terms of this solicitation. Where deemed appropriate by the Buyer, the limits of coverage will be included in the Special Instructions/Specifications. Certification of such coverage must be provided to the Buyer upon request. The Buyer and the awarded vendor may negotiate additional insurance requirements at their pleasure.

11. **WAIVER OF SUBROGATION** By virtue of submitting a proposal for this solicitation or acceptance of this contract, both Seller and insurance carrier waive any rights whatsoever with regard to subrogation against Education Service Center, Region 6 or its members as an indirect party to any suit arising out of personal or property damage

resulting from Seller's performance under this contract.

12 AWARD Action on all proposals shall be taken within ninety (90) calendar days from the date and time of opening of proposals/bids or as otherwise provided by applicable law and the price must remain firm for this period of time. The Seller whose offer is accepted shall execute the contract, if one is required, and all related documents within ten (10) days after presentation of the contract for signature or as otherwise agreed by the parties. The contract shall be deemed to be executed by the Seller when one (1) copy of the contract and related documents signed by an authorized officer of the Seller are received by the EPIC6 Purchasing Cooperative or member Buyer. Failure to execute the contract and related documents within the time specified may constitute a breach of this Agreement affecting the acceptance of the offer. Buyer reserves the right to award this contract in accordance with the laws of the State of Texas, to reject any or all proposals/bids, to waive any proposal/bid irregularities, and to accept any proposal/bid deemed to be in the best interest of the Buyer.

13. NONAPPROPRIATION OF FUNDS This agreement is subject to the appropriation of funds by ESC, Region 6 or its Texas members in its budget adopted for any fiscal year for the specific purpose of making payments pursuant to this agreement for that fiscal year. The obligations for ESC, Region 6 or its Texas members pursuant to this agreement in effect shall constitute a current expense of ESC, Region 6 or its Texas members for that fiscal year only, and shall not constitute an indebtedness of ESC, Region 6 or its Texas members beyond that fiscal year. Nothing contained herein shall constitute a pledge by ESC, Region 6 or its Texas members of any taxes or monies other than monies lawfully appropriated in any fiscal year. In the event of non-appropriation of funds in any fiscal year to make payments pursuant to this Agreement, this Agreement may be terminated. The requirements in this section entitled "NONAPPROPRIATION OF FUNDS" is per Texas statute and not negotiable by either the ESC Region 6 or its Texas members.