



RFP #121923
REQUEST FOR PROPOSALS
for
Technology Products and Services with Related Solutions

Proposal Due Date: December 19, 2023, 4:30 p.m., Central Time

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Technology Products and Services with Related Solutions to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than December 19, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

SOLICITATION SCHEDULE

Public Notice of RFP Published:	October 31, 2023
Pre-proposal Conference:	November 28, 2023, 10:00 a.m., Central Time
Question Submission Deadline:	December 11, 2023, 4:30 p.m., Central Time
Proposal Due Date:	December 19, 2023, 4:30 p.m., Central Time Late responses will not be considered.
Opening:	December 19, 2023, 4:30 p.m., Central Time See RFP Section V.G. "Opening"

I. ABOUT SOURCEWELL

A. SOURCEWELL

Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that facilitates a competitive public solicitation and contract award process for the benefit of its 50,000+ participating entities across the United States and Canada. Sourcewell's solicitation process complies with State of Minnesota law and policies, conforms to Canadian trade agreements (including Canadian Free Trade Agreement, Ontario-Quebec Trade and Cooperation Agreement, and Canada-European Union Comprehensive Economic and Trade Agreement, as applicable), and results in cooperative purchasing solutions from which Sourcewell's Participating Entities procure equipment, products, and services.

Cooperative purchasing provides participating entities and suppliers increased administrative efficiencies and the power of combined purchasing volume that result in overall cost savings. At times, Sourcewell also partners with other purchasing cooperatives to combine the purchasing volume of their membership into a single solicitation and contract expanding the reach of contracted suppliers' potential pool of end users.

Sourcewell uses a website-based platform, the Sourcewell Procurement Portal, through which all proposals to this RFP must be submitted.

B. USE OF RESULTING CONTRACTS

In the United States, Sourcewell's contracts are available for use by:

- Federal and state government entities¹;
- Cities, towns, and counties/parishes;
- Education service cooperatives;
- K-12 and higher education entities;
- Tribal government entities;
- Some nonprofit entities; and
- Other public entities.

In Canada, Sourcewell's contracts are available for use by:

¹ Pursuant to HAR §3-128-2, the State of Hawaii, Department of Accounting and General Services, State Procurement Office, on behalf of the State of Hawaii and participating jurisdictions, has provided notice of its Intent to Participate in the solicitation as a participating entity.

- Provincial and territorial government departments, ministries, agencies, boards, councils, committees, commissions, and similar agencies;
- Indigenous self-governing bodies;
- Regional, local, district, and other forms of municipal government, municipal organizations, school boards, and publicly funded academic, health, and social service entities referred to as MASH sector (this should be construed to include but not be limited to the Cities of Calgary, Edmonton, Toronto, Ottawa, and Winnipeg), as well as any corporation or entity owned or controlled by one or more of the preceding entities;
- Crown corporations, government enterprises, and other entities that are owned or controlled by these entities through ownership interest; and
- Members of the Canoe procurement group of Canada, and their partner associations: Canoe members are regional, local, district or other forms of municipal government, school boards, publicly-funded academic, health and social service entities in Alberta and across Canada, as well as any corporation or entity owned or controlled by one or more of the preceding entities – as well as partner associations, including Saskatchewan Association of Rural Municipalities, Association of Manitoba Municipalities, Local Authorities Services/Association of Municipalities Ontario, Nova Scotia Federation of Municipalities, Federation of Prince Edward Island Municipalities, Municipalities Newfoundland Labrador, Union of New Brunswick Municipalities, North West Territories Association of Communities, CivicInfo BC, and their members.

For a listing of current United States and Canadian Participating Entities visit Sourcewell's website (note: there is a tab for each country): <https://www.sourcewell-mn.gov/sourcewell-for-vendors/agency-locator>.

Participating Entities typically access contracted equipment, products, or services through a purchase order issued directly to the contracted supplier. A Participating Entity may request additional terms or conditions related to a purchase. Use of Sourcewell contracts is voluntary and Participating Entities retain the right to obtain similar equipment, products, or services from other sources.

To meet Participating Entities' needs, Sourcewell broadly publishes public notice of all solicitation opportunities, including this RFP. In addition, where applicable, other purchasing cooperatives and procurement officials receive notice and are encouraged to re-post the solicitation opportunity.

Proof of publication will be available at the conclusion of the solicitation process.

II. SOLICITATION DETAILS

A. SOLUTIONS-BASED SOLICITATION

This RFP and contract award process is a solutions-based solicitation; meaning that Sourcewell is seeking equipment, products, or services that meet the general requirements of the scope of this RFP and that are commonly desired or are required by law or industry standards.

B. REQUESTED EQUIPMENT, PRODUCTS, OR SERVICES

It is expected that proposers will offer a wide array of equipment, products, or services at lower prices and with better value than what they would ordinarily offer to a single government entity, a school district, or a regional cooperative.

1. Sourcewell is seeking proposals for Technology Products and Services with Related Solutions. Awards under this solicitation for Technology Products and Services with Related Solutions will be in three (3) categories. Proposers submitting a proposal in Category 1 as defined herein must include at least one solution in each of Categories 1, 2, and 3 within its singular proposal. For example, if a Proposer offers solutions within the scope of Category 1, 2 and 3 the Proposer should designate it is seeking an award in Category 1. Proposers seeking award in Category 2 and/or 3 as defined herein must include at least one solution offered within the scope of the desired Category.

Category 1: Technology Products and Services with Related Solutions, such as:

- a. Computer hardware, including desktops, laptops, tablets, and related devices;
- b. Networking, server, and data storage equipment, including servers, server appliances, racks and cabinets, data storage or data protection devices, and switching technology;
- c. Peripherals, accessories, components, and options, including printers, scanners, monitors, audio visual, digital signage, virtual reality, Esports equipment, unified communication hardware, mobility hardware, cabling, modems, routers, switches, power management, and supplies;
- d. Software related to the purchase of the equipment described in Section 1a. - c. above;
- e. Configuration, software implementation, hardware installation, support, assessment, training, and asset lifecycle services related to the purchase of the equipment or software described in Section 1 a.- d. above; and
- f. Security, cloud, network, data, IT asset lifecycle services, and solutions described in Categories 2 and 3 below.

Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases for

solutions defined in Category 1. The catalog must be designed to populate with the Sourcewell and Sourcewell Participating Entities pricing offered by the proposer. Alternate forms of transaction (e.g., PO and invoice transactions) are a permissible ancillary service method.

Category 2: Security, Cloud, Network, and Data Services with Related Solutions, including, but not limited to:

- a. Cybersecurity services, such as cyber risk assessments, program strategy and operations, zero trust, skills and training, penetration testing, threat and vulnerability management, content security, network visibility and endpoint detection, log aggregation and correlation, disaster response and recovery, and managed cybersecurity;
- b. Physical security services, such as site assessment, upgrade planning and execution design, installation, integration, access control, video management, and managed physical security services;
- c. Cloud, such as Infrastructure as a Service (IaaS), Platform as a Service (PaaS), Software as a Service (SaaS), and strategy, design, migration, deployment, and managed cloud solutions;
- d. Network, such as maintenance and monitoring, edge computing, SD-WAN and LAN, and data center networking;
- e. Data, such as data modernization, data backup, data and document processing and storage, and assessment, validation, production, and management of AI and machine learning solutions; and
- f. Related solutions, such as endpoint security products, network security technologies, identity and access management technologies, security analytics, data security products, IP video monitoring systems, intelligent controllers, mission control systems, electronic locks, network infrastructure, and server room technology.

Proposers may include related equipment, accessories, and technology to the extent that these solutions are ancillary or complementary to the services and solutions being proposed in Category 2 above.

The primary focus of Category 2 is on security, cloud, network, and data services. This category should NOT be construed to include:

- a. Products or accessories-only solutions
- b. Software-as-a-Service (SaaS)-only solutions
- c. Staff Augmentation

Category 3: IT Lifecycle Services, such as:

- a. IT Asset Management Services, including hardware and software asset management, software as a service management, audit management, maturity assessments, sustainability solutions, and repair and maintenance;
- b. IT datacenter decommissioning, including planning and valuation, data shredding, de-racking, de-cabling, de-powering, and packing; and,
- c. IT Asset Disposal and Retirement Services, including secure data destruction, serialization, asset value recovery, recycling, remarketing, refurbishing, onsite collection, and ESG reporting.

Proposers may include related equipment, software, technology, accessories, and services to the extent that these solutions are ancillary or complementary to the services being proposed in Category 3 above.

2. This solicitation does not include those equipment, products, or services covered under categories included in contracts currently maintained by Sourcewell:

- a. Communications Technology Consulting Services (RFP #072822) with the exception of those ancillary or complementary to Categories 1-3 above.

Generally, the solutions for Participating Entities are turn-key solutions, providing a combination of equipment, products and services, delivery, and installation to a properly operating status. However, equipment-only or products-only solutions may be appropriate for situations where Participating Entities possess the ability, either in-house or through local third-party contractors, to properly install and bring to operation the equipment or products being proposed.

Sourcewell prefers suppliers that provide a sole source of responsibility for the equipment, products, and services provided under a resulting contract. If proposer is including the equipment, products, and services of its subsidiary entities, the proposer must also identify all included subsidiaries in its proposal. If proposer requires the use of distributors, dealers, resellers, or subcontractors to provide the equipment, products, or services, the proposal must address how the equipment, products or services will be provided to Participating Entities, and describe the network of distributors, dealers, resellers, and/or subcontractors that will be available to serve Participating Entities under a resulting contract.

Sourcewell encourages suppliers to offer the broadest possible selection of equipment, products, and services being proposed over the largest possible geographic area and to the largest possible cross-section of Sourcewell current and future Participating Entities.

C. REQUIREMENTS

It is expected that proposers have knowledge of all applicable industry standards, laws, and regulations and possess an ability to market and distribute the equipment, products, or services to Participating Entities.

1. Safety Requirements. All items proposed must comply with current applicable safety or regulatory standards or codes.
2. Deviation from Industry Standard. Deviations from industry standards must be identified with an explanation of how the equipment, products, and services will provide equivalent function, coverage, performance, and/or related services.
3. New Equipment and Products. Proposed equipment and products must be for new, current model; however, proposer may offer certain close-out equipment or products if it is specifically noted in the Pricing proposal.
4. Delivered and operational. Unless clearly noted in the proposal, equipment and products must be delivered to the Participating Entity as operational.
5. Warranty. All equipment, products, supplies, and services must be covered by a warranty that is the industry standard or better.

D. PROSPECTIVE CONTRACT TERM

The term of any resulting contract(s) awarded by Sourcewell under this solicitation will be four years. Sourcewell and supplier may agree to up to three additional one-year extensions based on the best interests of Sourcewell and its Participating Entities. Sourcewell retains the right to consider additional extensions beyond seven years as required under exceptional circumstances.

E. ESTIMATED CONTRACT VALUE AND USAGE

Based on past volume of similar contracts, the estimated annual value of all transactions from contracts resulting from this RFP are anticipated to be USD \$1.5 Billion for Category 1, \$500 Million for Category 2, and \$50 Million for Category 3. Therefore, proposers are expected to propose volume pricing. Sourcewell anticipates considerable activity under the contract(s) awarded from this RFP; however, sales and sales volume from any resulting contract are not guaranteed.

F. MARKETING PLAN

Proposer's sales force will be the primary source of communication with Participating Entities. The proposer's Marketing Plan should demonstrate proposer's ability to deploy a sales force

or dealer network to Participating Entities, as well as proposer's sales and service capabilities. It is expected that proposer will promote and market any contract award.

G. ADDITIONAL CONSIDERATIONS

1. Contracts will be awarded to proposers able to best meet the need of Participating Entities. Proposers should submit their complete line of equipment, products, or services that are applicable to the scope of this RFP.
2. A proposer may submit only one proposal. If related, affiliated, or subsidiary entities elect to submit separate proposals, rather than a single parent-entity proposal, each such proposal must be prepared independently and without cooperation, collaboration, or collusion.
3. If a proposer works with a consultant on its proposal, the consultant (an individual or company) may not assist any other entity with a proposal for this solicitation.
4. Proposers should include all relevant information in its proposal, since Sourcewell cannot consider information that is not included in the proposal. Sourcewell reserves the right to verify proposer's information and may request clarification from a proposer, including samples of the proposed equipment or products.
5. Proposers including solutions offered within the scope of Categories 1, 2, and 3 within its singular proposal must designate they are seeking award in Category 1 in the Sourcewell Procurement Portal. Proposers seeking award in Category 2 and/or 3 as defined herein must make that designation in the Sourcewell Procurement Portal. Proposers may only receive an award within the Category(-ies) they designate. Sourcewell reserves the right to re-categorize any designation as it deems appropriate.
6. A proposer's documented negative past performance with Sourcewell or its Participating Entities occurring under a previously awarded Sourcewell contract may be considered in the evaluation of a proposal.

III. PRICING

A. REQUIREMENTS

All proposed pricing must be:

1. Either Line-Item Pricing or Percentage Discount from Catalog Pricing, or a combination of these:
 - a. **Line-item Pricing** is pricing based on each individual product or services. Each line must indicate the proposer's published "List Price," as well as the "Contract Price."
 - b. **Percentage Discount from Catalog or Category** is based on a percentage discount from a catalog or list price, defined as a published Manufacturer's Suggested Retail Price (MSRP) for the products or services. Individualized percentage discounts can be applied to any number of defined product groupings. Proposers will be responsible for providing and maintaining current published MSRP with Sourcewell,

and this pricing must be included in its proposal and provided throughout the term of any contract resulting from this RFP.

2. The proposer's not to exceed price. A not to exceed price is the highest price for which equipment, products, or services may be billed to a Participating Entity. However, it is permissible for suppliers to sell at a price that is lower than the contracted price.
3. Stated in U.S. and Canadian dollars (as applicable).
4. Clearly understandable, complete, and fully describe the total cost of acquisition (e.g., the cost of the proposed equipment, products, and services delivered and operational for its intended purpose in the Participating Entity's location).

Proposers should clearly identify any costs that are NOT included in the proposed product or service pricing. This may include items such as installation, set up, mandatory training, or initial inspection. Include identification of any parties that impose such costs and their relationship to the proposer. Additionally, proposers should clearly describe any unique distribution and/or delivery methods or options offered in the proposal.

B. ADMINISTRATIVE FEES

Proposers awarded a contract are expected to pay to Sourcewell an administrative fee in exchange for Sourcewell facilitating the resulting contracts. The administrative fee is normally calculated as a percentage of the total sales to Participating Entities for all contracted equipment, products, or services made during a calendar quarter, and is typically one percent (1%) to two percent (2%). In some categories, a flat fee may be an acceptable alternative.

IV. CONTRACT

Proposers awarded a contract will be required to execute a contract with Sourcewell (see attached template). Only those modifications the proposer indicates in its proposal will be available for discussion. Much of the language in the Contract reflects Minnesota legal requirements and cannot be altered. Numerous and/or onerous exceptions that contradict Minnesota law may result in the proposal being disqualified from further review and evaluation.

To request a modification to the template Contract, a proposer must submit the Exceptions to Terms, Conditions, or Specifications table with its proposal. Only those exceptions noted at the time of the proposal submission will be considered.

Exceptions must:

1. Clearly identify the affected article and section.
2. Clearly note the requested modification; and as applicable, provide requested alternative language.

Unclear requests will be automatically denied.

Only those exceptions that have been accepted by Sourcewell will be included in the contract document provided to the awarded supplier for signature.

If a proposer receives a contract award resulting from this solicitation it will have up to 30 days to sign and return the contract. After that time, at Sourcewell's sole discretion, the contract award may be revoked.

V. RFP PROCESS

A. PRE-PROPOSAL CONFERENCE

Sourcewell will hold an optional, non-mandatory pre-proposal conference via webcast on the date and time noted in the Solicitation Schedule for this RFP and on the Sourcewell Procurement Portal. The purpose of this conference is to allow potential proposers to ask questions regarding this RFP and Sourcewell's competitive contracting process. Information about the webcast will be sent to all entities that have registered for this solicitation opportunity through their Sourcewell Procurement Portal Vendor Account. Pre-proposal conference attendance is optional.

B. QUESTIONS REGARDING THIS RFP AND ORAL COMMUNICATION

All questions regarding this RFP must be submitted through the Sourcewell Procurement Portal. The deadline for submission of questions is found in the Solicitation Schedule and on the Sourcewell Procurement Portal. Answers to questions will be issued through an addendum to this RFP. Repetitive questions will be summarized into a single answer and identifying information will be removed from the submitted questions.

All questions, whether specific to a proposer or generally related to the RFP, must be submitted using this process. Do not contact individual Sourcewell staff to ask questions or request information as this may disqualify the proposer from responding to this RFP. Sourcewell will not respond to questions submitted after the deadline.

C. ADDENDA

Sourcewell may modify this RFP at any time prior to the proposal due date by issuing an addendum. Addenda issued by Sourcewell become a part of the RFP and will be delivered to potential proposers through the Sourcewell Procurement Portal. Sourcewell accepts no liability in connection with the delivery of any addenda.

Before a proposal will be accepted through the Sourcewell Procurement Portal, all addenda, if any, must be acknowledged by the proposer by checking the box for each addendum. It is the responsibility of the proposer to check for any addenda that may have been issued up to the solicitation due date and time.

If an addendum is issued after a proposer submitted its proposal, the Sourcewell Procurement Portal will WITHDRAW the submission and change the proposer's proposal status to INCOMPLETE. The proposer can view this status change in the "MY BIDS" section of the Sourcewell Procurement Portal Vendor Account. The proposer is solely responsible to check the "MY BIDS" section of the Sourcewell Procurement Portal Vendor Account periodically after submitting its proposal (and up to the Proposal Due Date). If the proposer's proposal status has changed to INCOMPLETE, the proposer is solely responsible to:

- i) make any required adjustments to its proposal;
- ii) acknowledge the addenda; and
- iii) ensure the re-submitted proposal is received through the Sourcewell Procurement Portal no later than the Proposal Due Date and time shown in the Solicitation Schedule above.

D. PROPOSAL SUBMISSION

Proposer's complete proposal must be submitted through the Sourcewell Procurement Portal no later than the date and time specified in the Solicitation Schedule. Any other form of proposal submission, whether electronic, paper, or otherwise, will not be considered by Sourcewell. **Late proposals will not be considered.** It is the proposer's sole responsibility to ensure that the proposal is received on time.

It is recommended that proposers allow sufficient time to upload the proposal and to resolve any issues that may arise. The time and date that a proposal is received by Sourcewell is solely determined by the Sourcewell Procurement Portal web clock.

In the event of problems with the Sourcewell Procurement Portal, follow the instructions for technical support posted in the portal. It may take up to 24 hours to respond to certain issues.

Upon successful submission of a proposal, the Sourcewell Procurement Portal will automatically generate a confirmation email to the proposer. If the proposer does not receive a confirmation email, contact Sourcewell's support provider at support@bidsandtenders.ca.

To ensure receipt of the latest information and updates via email regarding this solicitation, or if the proposer has obtained this solicitation document from a third party, the onus is on the proposer to create a Sourcewell Procurement Portal Vendor Account and register for this solicitation opportunity.

Within the Sourcewell Procurement Portal, all proposals must be digitally acknowledged by an authorized representative of the proposer attesting that the information contained in the proposal is true and accurate. By submitting a proposal, proposer warrants that the information provided is true, correct, and reliable for purposes of evaluation for potential contract award. The submission of inaccurate, misleading, or false information is grounds for disqualification from a contract award and may subject the proposer to remedies available by law.

E. GENERAL PROPOSAL REQUIREMENTS

Proposals must be:

- In substantial compliance with the requirements of this RFP or it will be considered nonresponsive and be rejected.
- Complete. A proposal will be rejected if it is conditional or incomplete.
- Submitted in English.
- Valid and irrevocable for 90 days following the Proposal Due Date.

Any and all costs incurred in responding to this RFP will be borne by the proposer.

F. PROPOSAL WITHDRAWAL

Prior to the proposal deadline, a proposer may withdraw its proposal.

G. OPENING

The Opening of proposals will be conducted in the Sourcewell Procurement Portal immediately following the proposal due date and time. To view the list of proposers resulting from the opening, verify that the Sourcewell Procurement Portal opportunities list search is set to "All" or "Closed."

Members of the public may attend the Opening at Sourcewell's office located at 202 12th Street NE, Staples, MN to hear the results.

VI. EVALUATION AND AWARD

A. EVALUATION

It is the intent of Sourcewell to award one or more contracts to responsive and responsible proposers offering the best overall quality, selection of equipment, products, and services, and price that meet the commonly requested specifications of Sourcewell and its Participating Entities. The award(s) will be limited to the number of proposers that Sourcewell determines is necessary to meet the needs of its Participating Entities.

Factors to be considered in determining the number of contracts to be awarded in any category may include the following:

- Total evaluation scores (giving consideration to natural breaks in the scoring of responsive proposals);
- The number and geographic location of highest-scoring proposers that offer:
 - A comprehensive selection of the requested equipment, products, or services;

- A sales and service network ensuring availability and coverage for Participating Entities' use; and
- Other attributes of the proposer or contents of its proposal that assist Participating Entities in achieving environmental and social requirements, and goals.

Information submitted as part of a proposal should be as specific as possible when responding to the RFP. Do not assume Sourcewell has any knowledge about a specific supplier or product.

B. AWARD(S)

Award(s) will be made to the highest-scoring proposer(s) in each category whose proposal conforms to all conditions and requirements of the RFP, and consistent with the award criteria defined in this RFP.

Sourcewell may request written clarification of a proposal at any time during the evaluation process.

Proposal evaluation will be based on the following scoring criteria and the Sourcewell Evaluator Scoring Guide (a copy is available in the Sourcewell Procurement Portal):

Conformance to RFP Requirements	50
Financial Viability and Marketplace Success	75
Ability to Sell and Deliver Service	100
Marketing Plan	50
Value Added Attributes	75
Warranty and Performance Standards or Guarantees	50
Depth and Breadth of Offered Equipment, Products, or Services	200
Pricing	400
TOTAL POINTS	1000

C. PROTESTS OF AWARDS

Any protest made under this RFP by a proposer must be in writing, addressed to Sourcewell's Executive Director, and delivered to the Sourcewell office located at 202 12th Street NE, P.O. Box 219, Staples, MN 56479. All documents that comprise the complete protest package must be received, and time stamped at the Sourcewell office by 4:30 p.m., Central Time, no later than 10 calendar days following Sourcewell's notice of contract award(s) or non-award. A protest must allege a procedural, technical, or legal defect, with supporting documentation. A protest that merely requests a re-evaluation of a proposal's content will not be entertained.

A protest must include the following items:

- The name, address, and telephone number of the protester;

- Identification of the solicitation by RFP number;
- A precise statement of the relevant facts;
- Identification of the alleged procedural, technical, or legal defect;
- Analysis of the basis for the protest;
- Any additional supporting documentation;
- The original signature of the protester or its representative; and
- Protest bond in the amount of \$20,000 (except where prohibited by law or treaty).

Protests that do not address these elements will not be reviewed.

D. RIGHTS RESERVED

This RFP does not commit Sourcewell to award any contract, and a proposal may be rejected if it is nonresponsive, conditional, incomplete, conflicting, or misleading. Proposals that contain false statements or do not support an attribute or condition stated by the proposer may be rejected.

Sourcewell reserves the right to:

- Modify or cancel this RFP at any time;
- Reject any and all proposals received;
- Reject proposals that do not comply with the provisions of this RFP;
- Select, for contracts or for discussion, a proposal other than that with the lowest cost;
- Independently verify any information provided in a proposal;
- Disqualify any proposer that does not meet the requirements of this RFP, is debarred or suspended by the United States or Canada, State of Minnesota, Participating Entity's state or province; has an officer, or other key personnel, who have been charged with a serious crime; or is bankrupt, insolvent, or where bankruptcy or insolvency are a reasonable prospect;
- Waive or modify any informalities, irregularities, or inconsistencies in the proposals received;
- Clarify any part of a proposal and discuss any aspect of the proposal with any proposer; and negotiate with more than one proposer;
- Award a contract if only one responsive proposal is received if it is in the best interest of Participating Entities; and
- Award a contract to one or more proposers if it is in the best interest of Participating Entities.

E. DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP will become property of Sourcewell and will become public record in accordance with Minnesota Statutes Section 13.591, after negotiations are complete. Sourcewell considers that negotiations are complete upon execution of a resulting contract. It is the proposer's responsibility to clearly identify any data

submitted that it considers to be protected. Proposer must also include a justification for the classification citing the applicable Minnesota law. Sourcewell may reject proposals that are marked confidential or nonpublic, either substantially or in their entirety.

Sourcewell will not consider the prices submitted by the proposer to be confidential, proprietary, or trade secret materials. Financial information, including financial statements, provided by a proposer is not considered trade secret under the statutory definition.



10/31/2023

Addendum No. 1

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

If we have already submitted for an RFP, can and should we submit for this as well?

Answer 1:

The Sourcewell RFP is an open and competitive solicitation process, and each RFP is an opportunity independent of any other prior, current, or future RFP. Each proposer, in its discretion, will propose the equipment, products, or services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 10/31/2023, is required at the time of proposal submittal.



11/02/2023

Addendum No. 2

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

If we were awarded under a different RFP, does this RFP replace that or will there be another RFP for Technology Products and Services with Related Solutions?

Answer 1:

The Sourcewell RFP is an open and competitive solicitation process, and each RFP is an opportunity independent of any other prior, current, or future RFP. Each proposer, in its discretion, will propose the equipment, products, or services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/02/2023, is required at the time of proposal submittal.



11/03/2023

Addendum No. 3

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

On pg. 3 of the RFP, it states that Sourcewell's contracts are available for use by Canadian entities including provincial and territorial government departments, ministries, agencies, boards, councils, committees, commissions, and similar agencies. However, the link provided below this section indicates that Sourcewell's Canadian Participating Entities do not currently include various provincial governments, e.g., Government of Ontario. Can you please clarify this issue?

Answer 1:

RFP Section I. B. – Use of Resulting Contracts, identifies various types of entities eligible to participate in Sourcewell membership and to utilize resulting contracts. It is left to the discretion of any particular entity to elect to become a Sourcewell participating entity and utilize Sourcewell's contracts.

Question 2:

Can Sourcewell please clarify the limitations that may apply to its Canadian Participating Entities for contracting at values exceeding a certain threshold, e.g., above which the RFP cannot be used?

Answer 2:

Sourcewell facilitates a competitive solicitation and award process throughout North America to meet the needs and expectations of participating entities. Acceptance and use always comes down to local policy and interpretation.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/03/2023, is required at the time of proposal submittal.



11/07/2023

Addendum No. 4

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Our company does not have an e-commerce site and we wanted to know if we can respond to only section 2 of the RFP. For example, my company would like to respond only to the services portion for this RFP.

Answer 1:

Having an e-commerce site is a requirement for Category 1. Proposers wishing to respond to Category 2 or 3 do not have that requirement.

Question 2:

The RFP states Sourcewell is a service cooperative open to eligible federal, state/province, and municipal government entities, higher education, K12, nonprofit, tribal government, and other public entities located in the US and Canada. Is a Sourcewell contract holder required to sell to all eligible Sourcewell entities in the US and Canada as noted in the RFP?

Answer 2:

A proposer is not required to sell to all participating entities located in the US and Canada to be considered for award. Each proposer is expected to complete the table in Step 1, entitled "Ability to Sell and Service" describing their ability to serve Sourcewell

members in the United States and Canada. Proposals are evaluated based on the criteria stated in the RFP.

Question 3:

Page 4 of the RFP states: Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases for solutions defined in Category 1.

Is requesting quotes from us (instead of purchasing directly on a website) an acceptable purchasing process for the Sourcewell bid?

Answer 3:

Having an e-commerce site that allows for purchases is a requirement for Category 1. Refer to RFP Section II. B. 1. – Category 1: “Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases for solutions defined in Category 1. The catalog must be designed to populate with the Sourcewell and Sourcewell Participating Entities pricing offered by the proposer. Alternate forms of transaction (e.g., PO and invoice transactions) are a permissible ancillary service method.”

Question 4:

Page 9 of the RFP states: The administrative fee is normally calculated as a percentage of the total sales to Participating Entities for all contracted equipment, products, or services made during a calendar quarter, and is typically one percent (1%) to two percent (2%). In some categories, a flat fee may be an acceptable alternative.

How do we know if the admin fee for this contract is 1% or 2%?

Answer 4:

Refer to RFP Section III. B. – Administrative Fees, for directions on proposing an administrative fee. It is left to the discretion of each proposer to determine and propose an administrative fee that is consistent with its business and its industry.

Question 5:

Will our RFP provided pricing be available only behind a paywall or will it be made public?

Answer 5:

Refer to RFP Section VI. E. - Disposition of Proposals, for guidance on materials submitted in response to the RFP and applicable public data laws.

Question 6:

Under Category 1 it states Proposers responding to Category 1 must offer a complete electronic catalog system. If we do not have an online marketplace, are we excluded on providing any hardware pricing?

Answer 6:

See Question 1, Answer 1.

Question 7:

Under Category 2, on services that require hardware, does it have to be a hardware sale? Do we price it as a service?

Answer 7:

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

Question 8:

If we do not bid on Category 1 but bid on Category 2 which may include hardware from Category 1, will we be able to fulfill the request?

Answer 8:

Proposers submitting a proposal in Category 1 must include at least one solution in each of Categories 1, 2, and 3. Proposers seeking award in Category 2 and/or 3 must include at least one solution offered within the scope of the desired Category.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/07/2023, is required at the time of proposal submittal.



11/08/2023

Addendum No. 5

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

How many proposer(s) are expected to be awarded for Category 1?

Answer 1:

Refer to RFP Section VI. A. – Evaluation, “It is the intent of Sourcewell to award one or more contracts to responsive and responsible proposers...The award(s) will be limited to the number of proposers that Sourcewell determines is necessary to meet the needs of its Participating Entities.”

Question 2:

Can the pre-proposal conference be moved to November 17, 2023?

Answer 2:

The pre-proposal conference will be held on November 28, 2023, at 10:00am Central Time. The pre-proposal conference is recorded, and a link will be sent to all registered suppliers.

Question 3:

With other GPO like RFXs we typically see standardized Pricing Tables with proposed items / SKUs in an Excel file format. Please provide guidance on how Proponents should specifically submit Pricing Attachments and how that provides for a fair and consistent evaluation of all submissions.

Answer 3:

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article III - Pricing. The pricing scores are arrived at by reviewing attributes including stated discounts, the value to the participating entity, clarity, and ease of use of the proposed pricing. Proposals are evaluated based on the criteria stated in the RFP.

Question 4:

The Main RFP document states an estimated TCV of USD \$1.5 Billion for Category 1, \$500 Million for Category 2, and \$50 Million for Category 3. This of course includes US and Canada financials. The Canadian and US market have several key differences in structure as well as Proponents that contribute to taxpayer based Public Sector funding. Please provide details on the size and scope of the Canadian only business through Canoe Sourcewell and explain if the Scoring and Awards would be independent for each Country - Public Sector Marketplace.

Answer 4:

The RFP anticipated volume is an estimate based on past volumes of similar Sourcewell contracts. It is an estimate only, and no sales or sales volume are guaranteed. There is no separate estimate of Canadian volume or percentage estimates by geographic region.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/08/2023, is required at the time of proposal submittal.



11/9/2023

Addendum No. 6

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Table 15A includes questions 74 through 79; however, questions 77 and 78 appear to reference an older version with different numbering. Specifically, Q77 addresses 'software related to the purchase of the equipment described in Lines 72 -74 above' which should read Lines 74 – 76. Further Q78 addresses 'Configuration, software implementation, hardware installation, support, assessment, training, and asset lifecycle services related to the purchase of the equipment or software described in Lines 72 – 75 above' which should read lines 77.

Will Sourcewell release an updated Table 15A to reflect updated line numbers?

Answer 1:

Table 15A has been corrected and is available in the Sourcewell Procurement Portal.

Question 2:

Pricing (RFP Section III, A. Requirements, 1 – page 8) is directed as either Line-Item Pricing or Percentage Discount from Catalog Pricing, or a combination of these. Sourcewell goes on to define Percentage Discount from Catalog or Category as 'based on a percentage discount from a catalog or list price, defined as a published Manufacturer's Suggested Retail Price (MSRP) for the products or services.' Will Sourcewell include an additional definition of percentage discount from a catalog or list price defined as 'that price that is publicly available and verifiable such as a company web-based, nationally advertised price as defined on company's website for products or services?'

Answer 2:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to articulate and propose the pricing approach that aligns with their business methods and satisfies the requirements of RFP Section III. – Pricing. Proposals are evaluated based on the criteria stated in the RFP.

Question 3:

Regarding Table 3: Industry Recognition & Marketplace Success, Line item #22, can you please clarify if bidders should provide an aggregate total of the sales volume or separate figures for each of the three years' annual sales volume?

Answer 3:

It is left to the discretion of each proposer to determine the information and documentation necessary to best demonstrate their Financial, Industry and Marketplace Success and satisfy all the requirements included in the questionnaire tables.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/9/2023, is required at the time of proposal submittal.



11/15/2023

Addendum No. 7

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

We are a provider of on-prem and SaaS solutions with accompanying services. We are trying to determine if our solutions would be eligible for this RFP. For Category 2, the RFP states that it includes but is not limited to: Cloud, such as...Software as a Service (SaaS), and strategy, design, migration, deployment, and managed cloud solutions. But later states that Category 2 should NOT include Software-as-a-Service (SaaS)-only solutions. How are you defining the difference between these two? Is the latter implying an offering without any accompanying services?

Answer 1:

The primary focus of Category 2 is on security, cloud, network, and data services. This category should NOT be construed to include: Software-as-a-Service (SaaS)-only solutions. Proposers that provide only those solutions will be deemed out of scope.

Question 2:

Will we have an enrollment form with the end user once the Purchase Order is received? The enrollment form will include terms and conditions that spells out billing with the end user, indemnification etc.

Answer 2:

Refer to Sourcewell contract template Section 6. B. – Additional Terms and Conditions/Participating Addendum. “Additional terms and conditions to a purchase order may be negotiated between a Participating Entity and Supplier, such as job or industry-specific requirements, legal requirements (e.g., affirmative action or immigration status requirements), or specific local policy requirements. ... Any

negotiated additional terms and conditions must never be less favorable to the Participating Entity than what is contained in this Contract.”

Question 3:

The contract that was included in the RFP, does it govern the relationship between Sourcewell and the vendor?

Answer 3:

Yes, refer to the template contract.

Question 4:

If we propose changes to the contract, can we provide an addendum or do we need to redline the Contract Template?

Answer 4:

Refer to Table 18: Exceptions to Terms, Conditions, or Specifications Form for directions on how to submit redline requested modifications to the contract.

Question 5:

Specifications, Table 3: Industry Recognition & Marketplace Success, Items 20 and 21: If a respondent can provide the total sales for the U.S. for the past three years as a Manufacturer since that information is available publicly, but is not able to provide the exact percentage of Government or Education sales, will the respondent be disqualified?

Answer 5:

It is left to the discretion of each proposer to determine the content and format of the data and documentation that best represents their proposal. Sourcewell will consider the relevant information submitted in each proposal and apply the evaluation criteria as set forth in the RFP.

Question 6:

Specifications, Table 3: Industry Recognition & Marketplace Success, Items 22 and 23: This section indicates that the annual sales volume for each contract needs to be disclosed. If a Manufacturer is not allowed to disclose the annual sales revenue for contracts without the express permission of the Lead State, GSA or Procurement official managing the contract for that State or Federal agency, can a manufacturer meet this requirement by providing Sourcewell the Procurement official's contact name and phone or email that is publicly available so Sourcewell can obtain this information?

Answer 6:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the information necessary to best demonstrate their past marketplace success and their ability to serve Sourcewell participating entities. Proposals are evaluated based on the criteria stated in the RFP.

Question 7:

Specifications, Table 5: Top Five Government or Education Customers: This section requests the top 5 customers for the respondent for government, education or non-profit. If a Manufacturer respondent instead provides the Top Five Government or Education customers willing to provide a reference will that meet this requirement since the Respondent cannot provide information on a specific customer without their express permission for a bid that will be disclosed publicly under the Open Records Act or Freedom of Information Act?

Answer 7:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the information necessary to best demonstrate their past marketplace success and their ability to serve Sourcewell participating entities. Proposers are not required to provide entity names when demonstrating their past marketplace.

Question 8:

Specifications, Table 6: Ability to Sell and Deliver Service, Item 35: Can Sourcewell please define 'U.S. Territories'?

Answer 8:

The US territories are American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands.

Question 9:

Specifications, Table 11: Pricing and Delivery, Item 59: If a respondent is providing guaranteed discounts by category, is a Price list by line item still required?

Answer 9:

It is left to the discretion of each proposer to articulate and propose the pricing approach that aligns with their business methods and satisfies the requirements of RFP Article III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/15/2023, is required at the time of proposal submittal.



11/20/2023

Addendum No. 8

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Can Sourcewell confirm how a respondent would submit confidential information?

Answer 1:

RFP Section VI. E. - Disposition of Proposals, addresses the handling of materials submitted in response to the RFP under Minnesota Statutes Section 13.591.

Question 2:

There is no list of what is being procured. How do we know what to offer? who is procuring what product and quantity?

Answer 2:

Sourcewell utilizes a competitive, solutions-based solicitation approach that is not based on detailed specifications or finite quantities. A proposer can propose its entire line of equipment, products, and services falling within the requested equipment, products, and services as described in the RFP.

Question 3:

RFP_121923_Technology_Products.pdf file, Section IV. Contract; Table 18: Exceptions to Terms, Conditions, or Specifications Form; and Addendum 7, Answer to Question 4: Section IV. Contract of the RFP file states, 'To request a modification to the template Contract, a proposer must submit the Exceptions to Terms, Conditions, or Specifications table with its proposal.' However, Table 18: Exceptions to Terms, Conditions, or Specifications Form states, 'a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Contract Template provided'.

Also, in Addendum 7, Answer to Question 4, it states, 'Refer to Table 18: Exceptions to Terms, Conditions, or Specifications Form for directions on how to submit redline requested modifications to the contract.'

To make it easier for Sourcewell to review, can Bidders only provide a redlined version of the Contract Template in lieu of providing a table with each exception listed?

Answer 3:

To identify any exception, or to request any modification, to Sourcewell standard Contract terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Contract Template provided in the "Bid Documents" section. Proposer must upload the redline in the "Requested Exceptions" upload field. All exceptions and/or proposed modifications are subject to review and approval by Sourcewell and will not automatically be included in the Contract. In Table 18, the proposer only needs to acknowledge whether they have proposed exceptions or modifications.

Question 4:

Addendum 7, Answer to Question 4: In Addendum 7, Answer to Question 4, it states, 'Refer to Table 18: Exceptions to Terms, Conditions, or Specifications Form for directions on how to submit redline requested modifications to the contract.'

Does that mean that no separate Exception Table is needed and that Table 18 instruction providing a redline to the Contract Template is all that is required?

Answer 4:

Refer to answer #3 above.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/20/2023, is required at the time of proposal submittal.



11/22/2023

Addendum No. 9

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Q17, Q92

Question 17 requests “licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.”
and

Question 92 requests “list any certifications or testing results you or your partner(s) hold which show security posture in your proposed solutions, if applicable.”
Is Sourcewell seeking company licenses and certifications, employee licenses and certifications or both?

Answer 1:

Refer to template contract Section 19. – Compliance. It is left to the discretion of each proposer to determine the documentation necessary to best demonstrate their ability to serve Sourcewell participating entities. In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. The solicitation is a competitive process and proposals are evaluated on the content submitted.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/22/2023, is required at the time of proposal submittal.



11/27/2023

Addendum No. 10

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

If our company is only submitting for category 3 how should we fill in Tables 14B, 15A, 15B, 16A, and 16B?

Answer 1:

Proposers only need to respond to the Categories where they are proposing solutions.

Question 2:

We would like the meeting instructions for RFP #121923 Technology Products and Services with Related Solutions.

Answer 2:

The pre-proposal conference login instructions are available in the Documents section of the Sourcewell Procurement Portal and will also be emailed 2 business days prior.

Question 3:

In Table 8 Question 44 of the response form, the prompt requests to describe any Woman or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications. If a company has certain MBE designations in the form of joint ventures, can they list those in this section without needing to submit the entire proposal as a joint venture?

Answer 3:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the content and format of the data that best represents their proposal and best demonstrates their ability to serve Sourcewell participating entities. The solicitation is a competitive process and proposals are evaluated on the content submitted.

Question 4:

How is MBE designation/participation evaluated as part of the proposal scoring?

Answer 4:

All proposals are evaluated based on the criteria stated in the RFP. Additional guidance can be found in the "Sourcewell Evaluator Scoring Guide" found on the "Bids Homepage" in the Resource Materials section of the Sourcewell Procurement Portal. MBE designation and participation is located in the Value-Added Attribute section of the Questionnaire tables.

Question 5:

In Table 8 Question 44 of the response form, the prompt requests companies describe hub partners that have been obtained. Please define -hub partner- in this context.

Answer 5:

"HUB" is an acronym for historically underutilized business.

Question 6:

Table 11 Question 59 requests detailed pricing data on all items companies want Sourcewell to consider. Please clarify - for a services company, what kind of pricing data would be acceptable to respond to this question? Ex: Would GSA rates be acceptable proof points?

Answer 6:

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

Question 7:

Are services companies required to respond to Table 9A (manufacturer warranty program)?

Answer 7:

Refer to the general instructions found in the header to Table 1, in Step 1 of the RFP Questionnaire. "General Instructions (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Please do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; mark "NA" if the question does not apply to you (preferably with an explanation)."

Question 8:

Table 6 Question 27 asks for a company's dealer network or distribution methods. Please define -dealer network- as applicable to services companies.

Answer 8:

Refer to RFP Section II. B. – Requested Equipment, Products, or Services – "... If Proposer requires the use of dealers, resellers, or subcontractors to provide the products or services, the Proposal should address how the products or services will be provided to Participating Entities and describe the network of dealers, resellers, and/or subcontractors that will be available to serve Participating Entities under a resulting contract." It is left to the discretion of each proposer to determine the information or documentation necessary to best demonstrate their ability to serve Sourcewell Participating Entities and satisfy all the requirements of the RFP and the questionnaire tables. Proposals are evaluated based on the criteria stated in the RFP. For additional detail on the requirement for awarded suppliers with respect to distributor/dealer networks, refer to Sourcewell Contract Template Section 2. C. – Dealers, Distributors, and/or Resellers.

Question 9:

We are asking you to postpone the submission date to at least January 19, 2024.

Answer 9:

With the availability of the Sourcewell Procurement Portal allowing for 24/7 remote access, an extension is not anticipated.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/27/2023, is required at the time of proposal submittal.



11/28/2023

Addendum No. 11

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Would Sourcewell please advise on how proposers who are offering multiple services under one category should respond to the solicitation? For example, under Category 2, if a proposer is submitting cybersecurity services and cloud services, is it acceptable for that proposer to submit one proposal to provide both services?

Answer 1:

Refer to RFP Section II. G. – Additional Considerations. Proposers may only submit one response. All offered solutions should be incorporated into that one response.

Question 2:

How can we verify the exact number of characters that are allowed in the narrative fields in Step 1?

Answer 2:

The character limit for the data entry fields is 32,000 characters.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/28/2023, is required at the time of proposal submittal.



11/30/2023

Addendum No. 12

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

As we are currently working through the development of the Category 2 services solutions we will be submitting in our response, we are also wondering what the process would be for adding additional solutions in the future, presuming that we are indeed named as an authorized reseller per Sourcewell's initial review of our response. The thinking here is that it would be best for us to submit our "fully baked" solutions now, and then look to add others later, as those are more completely developed. Thanks for your guidance in this regard.

Answer 1:

Section 4, Product and Pricing Change Requests of the Contract Template is applicable once a supplier has a contract and needs to change pricing or add or subtract products from the initial proposed offering within the scope of the original RFP.

Question 2:

Could Sourcewell please clarify the way information that is a Trade Secret is supposed to be submitted? For example, would Sourcewell like us to put the word Trade Secret in the text box in the portal, and provide a document with that information redacted in the documents upload section?

Answer 2:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. So, it is left to the discretion of each proposer to determine the information necessary to best demonstrate their ability to serve Sourcewell members and that they are willing to include. The solicitation is a competitive process and proposals are

evaluated on the content submitted. Sourcewell is subject to the Minnesota Government Data Practices Act and will not execute a non-disclosure agreement for a proposer. Reference Section VI. E. of the Sourcewell RFP.

Question 3:

In the ever changing landscape of cybersecurity, there are continuous updates to services that are provided for new threats. Is there a process Sourcewell follows for updating services offered to an awarded cooperative contract? If so, could Sourcewell provide the process?

Answer 3:

See Answer #1 above.

Question 4:

What is the approximate contract value of category 3? How did you calculate that value? Are there current members requesting specific lifecycle services (outside of those offered by vendor currently on the IT contract)? If so, can you describe the scope of opportunities those members have?

Answer 4:

Refer to RFP Section II. E. – Estimated Contract Value and Usage, “...the estimated annual value of Category 3 transactions from contracts resulting from this RFP are anticipated to be USD \$50 Million.” The RFP anticipated volume is an estimate based on past volumes of similar contracts. It is an estimate only, and no sales or sales volume are guaranteed.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/30/2023, is required at the time of proposal submittal.



12/01/2023

Addendum No. 13

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Table 9B - Can you further define specifically what services you are referring to in questions 53 and 54?

Answer 1:

Performance standards allow a proposer to describe any minimum or targeted performance standards applicable to their proposed solutions. Service standards allow a proposer to describe any service standards supporting their proposed solutions. Table 9B, Line items 53 and 54 provides examples of service standards or guarantees such as policies, metrics, or KPIs.

Question 2:

Can the state of Alabama utilize this contract?

Answer 2:

Refer to RFP Section I. A. Sourcewell – “Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that facilitates a competitive public solicitation and contract award process for the benefit of its 50,000+ participating entities across the United States and Canada.” Acceptance and use comes down to local policy and interpretation of the agency.

Question 3:

'At times Sourcewell also partners with other cooperatives'

Please provide examples of other cooperatives you have partnered with or are currently in partnership with.

Answer 3:

As stated in RFP Section I. A., "At times, Sourcewell also partners with other purchasing cooperatives...expanding the reach of contracted vendors' potential pool of end users." However, regarding this RFP, Sourcewell has not partnered with another purchasing cooperative to co-solicit this opportunity. Each RFP is an independent opportunity of any other prior, current or future RFPs.

Question 4:

Are there other state governments, in addition to Minnesota and Hawaii who currently buy from this contract? Are there any states that have explicitly stated they will not purchase from this contract?

Answer 4:

Many state agencies utilize Sourcewell contracts. Acceptance and use comes down to local policy and interpretation of the agency.

Question 5:

Please clarify the administrative fee for this contract, for each category. Please elaborate on the flat fee. Our assumption is that all vendors awarded would be paying the same fees to Sourcewell, is that correct?

Answer 5:

Refer to Addendum 4, Answer 4.

Question 6:

Is the admin fee of 1-2% collected on only contracted deals sold in the 5-county service area of Minnesota (Cass, Crow Wing, Morrison, Todd and Wadena counties)?

Answer 6:

The administration fee applies to all sales that result from Sourcewell contracts regardless of location.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/01/2023, is required at the time of proposal submittal.



12/5/2023

Addendum No. 14

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Is a CAGE code required to submit a response?

Answer 1:

A CAGE or Unique Entity Identifier (SAM) code is not required to be considered for or awarded a Sourcewell contract. Proposals are evaluated based on the criteria as stated in the RFP. Refer to the General Instructions above Questionnaire Table 1. Respond "N/A" if a question does not apply (preferably with an explanation).

Question 2:

Addendum 13 shows that it has 13 pages count next to download tab. when I downloaded it shows only 3 pages. If it more than 3 pages please update the system.

Answer 2:

The Sourcewell Procurement Portal has been updated to reflect 3 pages for Addendum 13.

Question 3:

Page 5, section Category 2c states Software as a Service (SaaS) is included. Further in the section, verbiage states This category should NOT be construed to include: b. Software-as-a-Service (SaaS)-only solutions. Question: What are SaaS only solutions?

Answer 3:

Sourcewell defines SaaS-only solutions as software-only solutions which are hosted in the cloud. Sourcewell is seeking more comprehensive cloud solutions which may include cloud strategy, design, migration, deployment, managed cloud, PaaS, or IaaS solutions.

Question 4:

If I understand correctly, an e-commerce site is required if we bid on category 1. May I ask why is there an upload option in Documents for the pricing table? Are we supposed to upload the entire catalog?

Answer 4:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/5/2023, is required at the time of proposal submittal.



12/6/2023

Addendum No. 15

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Could Sourcewell confirm if vendors can submit hourly rates for Category 2 as no specific scope of work is mentioned to determine project pricing?

Answer 1:

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Section III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

Question 2:

Can vendors provide remote and offshore candidates?

Answer 2:

It is left to the discretion of each proposer to determine the information and documentation necessary to best demonstrate their ability to serve Sourcewell participating entities and satisfy all the requirements included in the questionnaire tables. Proposals are evaluated based on the criteria stated in the RFP.

Question 3:

Are vendors allowed to work from offshore, considering a more competitive rate as compared to onshore?

Answer 3:

The Sourcewell RFP is an open and competitive solicitation process. Sourcewell does not restrict a proposer's ability to submit a proposal based on their physical location. It is

left to the discretion of each proposer to determine the information or documentation necessary to best demonstrate their ability to serve Sourcewell participating entities. Proposals are evaluated based on the criteria stated in the RFP.

Question 4:

Can firms provide job titles as pricing for the services they are bidding on?

Answer 4:

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Section III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

Question 5:

Can firms provide commercial experience in Table 5?

Answer 5:

Refer to the instructions for Table 5 – Line Item 25: “Provide a list of your top five government, education, or non-profit customers (entity name is optional), including entity type, the state or province the entity is located in, scope of the project(s), size of transaction(s), and dollar volumes from the past three years.”

Question 6:

Can bidders use electronic signatures?

Answer 6:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to articulate its capabilities in the manner that best aligns with their business methods.

Question 7:

Should firms provide a License to do Business for Sourcewell or the State of Minnesota alongside the response?

Answer 7:

Refer to Section 19 of the Sourcewell contract template regarding legal, regulatory, and licensure requirements. Proposers are solely responsible for acquiring any licenses to do business in the areas they propose to serve Sourcewell participating entities.

Question 8:

Do bidders have to provide a Good Standing Certificate with the response?

Answer 8:

Each proposer, in its discretion, will determine the documentation necessary to best demonstrate its ability to serve Sourcewell participating entities and fulfill the requirements set forth in the RFP. A Certificate of Good Standing is not a mandatory submittal requirement for submitting a proposal for this solicitation.

Question 9:

Is subcontracting required for bidding in this proposal? If so, what is the set-aside goal?

Answer 9:

Subcontracting is not a requirement for submitting a proposal. If a proposer intends to include subcontractors as part of its proposal refer to RFP Section II. B. – Requested Equipment, Products, or Services – “... If Proposer requires the use of dealers, resellers, or subcontractors to provide the products or services, the Proposal should address how the products or services will be provided to Participating Entities and describe the network of dealers, resellers, and/or subcontractors that will be available to serve Participating Entities under a resulting contract.” It is left to the discretion of each proposer to determine the information or documentation necessary to best demonstrate their ability to serve Sourcewell Participating Entities and satisfy all the requirements of the RFP and the questionnaire tables. Proposals are evaluated based on the criteria stated in the RFP.

Question 10:

What does Sourcewell expect from bidders to attach in the ‘Upload Additional Document’ section of the portal?

Answer 10:

Proposers may use the upload option in Step 2 of the proposal submission process to attach relevant supporting materials the proposer chooses to include with the proposal.

Question 11:

Is there a particular format regarding font, size, color, margins or structure for the attachments required from the bidders in Step 2-Documents?

Answer 11:

Refer to the instructions at the top of the page in Step 2 for additional guidance. PDF format is preferred, but Word, and Excel, or other compatible formats may be provided.

Question 12:

Should firms provide Certificates of Insurance with their response?

Answer 12:

Each proposer, in its discretion, will determine the documentation necessary to best demonstrate its ability to serve Sourcewell participating entities and fulfill the requirements set forth in the RFP. A Certificate of Insurance is not a mandatory submittal requirement for submitting a proposal for this solicitation.

Question 13:

Is there any SDVMBE/WBE/HUB participation goal for this bid?

Answer 13:

Sourcewell has not identified a specific socioeconomic goal for this solicitation. However, proposers may describe any socioeconomic certifications their company or hub partners have attained in Table 8, "Value-Added Attributes." Proposals are evaluated based on the criteria stated in the RFP.

Question 14:

Can firms utilize an Excel sheet to provide hourly rates for the service requested in Category 2?

Answer 14:

It is left to the discretion of each proposer to articulate and propose the pricing approach that aligns with their business methods and satisfies the requirements of RFP Section III. - Pricing. Proposers may use the upload fields in Step 2 of the proposal submission process to attach documents that the proposer chooses to include with the proposal. Proposals are evaluated based on the criteria stated in the RFP.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/6/2023, is required at the time of proposal submittal.



12/7/2023

Addendum No. 16

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Can the bidders make use of commercial references for table number 4?

Answer 1:

Refer to the instructions for Table 4 – Line Item 24: “Supply reference information from three customers who are eligible to be Sourcewell participating entities”.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/7/2023, is required at the time of proposal submittal.



12/12/2023

Addendum No. 17

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Does Sourcewell have a preferred price list format that should be used for the proposal and, if awarded, subsequent price lists updates to the contract?

Answer 1:

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Section III. – Pricing. Proposers may also review Section 4 of the Sourcewell Contract Template, “Product and Pricing Change Requests” for further clarification regarding post-award updates.

Question 2:

May additional services be added after contract award?

Answer 2:

Refer to Contract Template Section 4. “Product and Pricing Change Requests,” if awarded a contract a Supplier may request Equipment, Product, or Service changes, additions, or deletions at any time.

Question 3:

Section 2C of the Contract states: Supplier must provide to Sourcewell a current means to validate or authenticate Supplier’s authorized dealers, distributors, or resellers relative to the Equipment, Products, and Services offered under this Contract. Is there a prescribed process for this or can we simply provide a list and send updated versions if new resellers are added under this contract?

Answer 3:

Sourcewell does not require a specific process for updating Dealers, Distributors, and/or Resellers. Proposers are afforded the opportunity to describe their proposed means of updating their reseller network in Table 6, "Ability to Sell and Deliver Service" of the proposal response.

Question 4:

In line with Section 3 of the Contract, is our understanding correct that the pricing schedule would not include things like delivery, but that it will need to be included at the time of the quote?

Answer 4:

Refer to RFP Section III. A. - Pricing, "Proposers should clearly identify any costs that are NOT included in the proposed product or service pricing. This may include items such as installation, set up, mandatory training, or initial inspection. Include identification of any parties that impose such costs and their relationship to the proposer. Additionally, proposers should clearly describe any unique distribution and/or delivery methods or options offered in the proposal."

Question 5:

Section 6 of the contract states that order flow and procedure will be developed jointly between Sourcewell and Supplier. When and how does this occur?

Answer 5:

All awarded Suppliers are assigned a Supplier Development Administrator after the execution of the contract, any procedures developed will be done so after contract execution and with the assigned Supplier Development Administrator.

Question 6:

Is there a specific format for the annual business review?

Answer 6:

Upon award, that will be outlined during the contract launch with your Supplier Development Administrator.

Question 7:

Is there a specific format for the contract sales activity report, other than to include the fields identified in Section 8A of the Contract?

Answer 7:

All requirements pertaining to the Contract Sales Activity Report are specified in Section 8. A. of the contract template. Further information will be provided during the contract launch for awarded suppliers.

Question 8:

According to Section 8B of the Contract, payments must be received no later than 45 calendar days after the end of each calendar quarter. Does the 45 days from the quarter start at the quarter in which a quote is issued, delivery occurs, implementation occurs, final acceptance occurs, when the reseller is paid by the participating entity, or when the supplier is paid by its reseller?

Answer 8:

Refer to template contract Section 8 – Report on Contract Sales Activity and Administrative Fee Payment, for additional details on the required sales activity report, the required report fields, and the process for remittance of administrative fees. Most suppliers pay the agreed administrative fee once they receive payment for products, equipment or services rendered under contract.

Question 9:

Looking at Section 10A of the Contract, is our understanding correct that the extension to Participating Entities mean that they also have this examination right over transactions in which they were involved?

Answer 9:

Yes.

Question 10:

Referring to Section 18 of the Contract, given that we are a manufacturer/supplier, it seems unlikely that bodily or property damage would be necessary. If our insurance broker is in agreement, would it be possible to remove the requirements relating to worker's compensation and bodily/personal injury from the Commercial General Liability and perhaps just flow down this requirement, if necessary, to our resellers?

Answer 10:

A request for modification to the Sourcwell contract template may be submitted with a proposal. To request a modification to the template contract terms, conditions, or specifications, a proposer may complete and submit a contract template with tracked changes of the modifications they are requesting.

Question 11:

Regarding Section 21 of the Contract, is the express inclusion of all subsections herein an absolute requirement?

Answer 11:

A request for modification to the Sourcewell contract template may be submitted with the proposal. To request a modification to the template contract terms, conditions, or specifications, a proposer may complete and submit a contract template with tracked changes of the modifications they are requesting.

Question 12:

How would Sourcewell like for products to be referenced on the electronic catalogue?

Answer 12:

Refer to RFP Section II. B. 1 for details on the requested equipment, products, or services. Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases for solutions defined in Category 1. The catalog must be designed to populate with the Sourcewell and Sourcewell Participating Entities pricing offered by the proposer.

Question 13:

How do we customize products on the site?

Answer 13:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the content of its proposal. The Sourcewell Procurement Portal allows for respondents to provide narrative responses to each question and also allows a proposer to upload additional documents as a part of their response.

Question 14:

Most enterprise solutions require customization and cannot be built via a B2B, how should these customizations be reflected in the B2B portal?

Answer 14:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the content of its proposal. The Sourcewell Procurement Portal allows for respondents to provide

narrative responses to each question and also allows a proposer to upload additional documents as a part of their response.

Question 15:

What type of risk assessment is Sourcewell looking for?

Answer 15:

Refer to RFP Section II. B. 1 for details on the requested equipment, products, or services. Sourcewell is seeking equipment, products, or services that meet the general requirements of the scope of this RFP and that are commonly desired or are required by law or industry standards. Offerings and capabilities of the supplier's services, such as cyber risk assessment, must be proposed by the supplier.

Question 16:

For the estimated sales volume presented under E. Estimated Contract Value and Usage, Sourcewell, please break down these numbers by Government & education agencies in the US, Nonprofits in the US and Canadian organizations.

Answer 16:

The estimated value of all resultant contracts provided in Section II. E. of the RFP is based on past volumes of similar Sourcewell contracts. It is an estimate only, and no sales or sales volume are guaranteed. There is no separate estimate of Canadian volume or estimates by vertical.

Question 17:

Can you provide more clarity around Table 5, Size of Transaction(s)? Are you looking for details about the personnel/staffing size, level of effort or budget size, for example?

Answer 17:

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the information necessary to best demonstrate their past marketplace success. Proposals are evaluated based on the criteria stated in the RFP.

Question 18:

How many awards will be issued under each Category: Category 1, Category 2, and Category 3?

Answer 18:

Refer to RFP Section VI. A. Evaluation for details regarding awards issued under this RFP. "It is the intent of Sourcewell to award one or more contracts to responsive and responsible proposers offering the best overall quality, selection of equipment, products, and services, and price that meet the commonly requested specifications of Sourcewell and its Participating Entities. The award(s) will be limited to the number of proposers that Sourcewell determines is necessary to meet the needs of its Participating Entities."

Question 19:

Will any category awards be reserved for SMALL, WBE, or MBE businesses?

Answer 19:

Sourcewell has not identified a specific socioeconomic goal for this solicitation. However, proposers may describe any socioeconomic certifications their company or hub partners have attained in Table 8, "Value-Added Attributes." Proposals are evaluated based on the criteria stated in the RFP.

End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/12/2023, is required at the time of proposal submittal.