CATEGORY 2 EQUIPMENT SERVICE SPECIFICATIONS

Applicant:	**Kalispell School District**
BEN:	**135173**
Form 470 #:	**270001748**
Form 470 Contacts:	**Eric Miletich eric.miletich@sd5.k12.mt.us / Jennifer Williams jwilliams@e-ratecentral.com**

Procurement Timeline

Task	Due By
Issue Date	See Form 470 Certification Date
Deadline to Submit Questions	11/11/2026 10:00 AM MST
Posting of Questions/Clarifications	11/13/2026
Proposal Submission Deadline	12/11/2026 10:00 AM MST

Communications and Questions

All communication with the Applicant regarding this solicitation **must** be emailed and received by the "Deadline to Submit Questions" noted in the "Procurement Timeline." Questions should be directed to all "Form 470 Contacts" listed above, with the Form 470 Number included in the subject line. Failure to include all "Form 470 Contacts" could result in questions going unanswered. Verbal inquiries are not allowed. Clarifications, when applicable, will be posted as an attachment/addendum to Form 470. Each Offeror is responsible for downloading the current version of Form 470 and attachments, including any addenda. Applicant reserves the right to ask vendors clarifying questions during the proposal review process.

Contact initiated by an Offeror concerning this solicitation with any other Applicant representative other than those listed as Form 470 contacts is prohibited. Unauthorized contact may result in the offeror's disqualification from this solicitation.

Product demonstration meetings will not be granted during the competitive bidding period – requests for such will be ignored.

Site Visit

For this solicitation, a site visit is: ☐ Required ☐ Optional ☒ Not Offered

Proposal Instructions

Proposals **must** be submitted by the Proposal Submission Deadline in the Procurement Timeline.

Proposals should be emailed to ALL Form 470 Contacts listed above and include the following:

- Applicant name
- Form 470 number
- SPIN (Service Provider Identification Number)
- Service provider's terms and conditions
- Completed Pricing Attachment

Proposals **must** include all costs associated with providing the requested products/services to the applicant including but not limited to shipping fees, licenses, and any component needed for the proposed equipment to function properly.

In addition to or in place of a service provider's standard quote format, proposal pricing should be included in the Pricing Attachment provided and be submitted in Excel or equivalent format.

Proposed service fees for each piece of equipment should:

- be shown as unit pricing with separate line-item charges for each SKU,
- identify the percentage of each SKU that is eligible for E-Rate support as agreed upon by USAC and the manufacturer; and
- be categorized as Internal Connections (IC), Basic Maintenance of Internal Connections (BMIC), and/or Managed Internal Broadband Services (MIBS).

Proposals **must** be in response to the specific requirements of this solicitation. Offers including a generic listing of services beyond the scope of this solicitation and/or encyclopedic price lists will be disqualified. SPAM and/or robotic responses will not be considered valid responses and will be disqualified from consideration.

Existing Network Environment

The Applicant intends to procure network infrastructure that integrates effectively with its existing environment while supporting future growth and modernization.

The Applicant's current network environment includes, but is not limited to:

Core and Distribution Infrastructure

Manufacturer: Extreme Networks
Models: 5520 and 5320 series. 48port, 24port, and 16port.
Current software versions: Standardized on v32.
Routing protocols in use: Internal static routing
Existing VLAN architecture and segmentation strategy. Standard VLAN segmentation currently in practice.

Wireless Infrastructure

Manufacturer: Extreme Networks
Wireless management platform: Cloud controlled via Extreme Cloud IQ
Number of access points: 455 districtwide

Current wireless standards supported: Wi-Fi 5 and 6

Network Security Infrastructure

Firewall platform(s): Watchguard M4800
Authentication services: MS Active Directory, Google SSO
RADIUS/TACACS+ services: RADIUS Auth
Network access control solution(s): Microsoft NPS

Network Management and Monitoring

Network monitoring platforms: PRTG Network Monitor
Configuration management tools: Mosyle, PDQ
Logging and SIEM platforms: SentinelOne

Physical Infrastructure

Fiber optic infrastructure: Single Mode
Copper cabling infrastructure: Cat6
Existing transceiver standards: SFP, SFP+
Power-over-Ethernet requirements: PoE, PoE+, PoE++

Equipment/Service Request

The applicant requests proposals for new E-Rate eligible Category 2 equipment.

Equipment Scope of Work

Proposals are requested for the makes/models specified in the provided Pricing Attachment (or equivalent). Offers containing alternative makes/models are required to submit product specifications and documentation to establish that the equipment is equivalent to the requested solution. The applicant will be the arbiter of whether the proposed solution is functionally and technically equivalent to the requested solution.

The quantities requested are the applicant's best estimate and may be adjusted based on the offeror's recommendations. The applicant reserves the right to increase or reduce quantities and buy some, all, or none of the listed equipment.

Proposals featuring equipment that is used, open box, refurbished, or categorized in any way other than new will be disqualified.

Partial offers will be considered; however, each equipment bid must include complete pricing for all licenses, cables, and related components of equipment is required.

Installation Scope of Work

For this solicitation, vendor installation services are: ☐ Required ☐ Optional ☒ Not Requested

Delivery

All equipment and/or materials under this solicitation shall be delivered to the following location(s):

- Kalispell Administrative Offices 233 First Avenue East, Kalispell, MT 59901

Contract Requirements

The applicant prefers a multi-year agreement (term dates April 1, 2027 – September 30, 2029). An initial award term of April 1, 2027 – September 30, 2028, with one optional renewal to align with an extended E-Rate service delivery deadline, if needed, is also acceptable. For licenses applicant is requesting a contract term of five years (term dates July 1, 2027 – June 30, 2032).

The quoted pricing must not assume the applicant will purchase the full quantities listed in the proposal.

The applicant reserves the right to place orders as needed and is not obligated to order all products or services.

Substitutions for alternative equipment must be agreed upon in writing by both parties before finalization of any changes/deviations from the original agreed-upon equipment list.

Offerors proposing equipment whose prices may increase depending upon new U.S. government tariffs imposed on imports are encouraged to (a) identify such products in their offers, and (b) propose an acceptable methodology for limiting price adjustments over the contract term.

E-Rate Specific Considerations

Options for Basic Maintenance of Internal Connections and Managed Internal Broadband Services were selected out of an abundance of caution. The Applicant is not requesting time-and-materials basic maintenance services and is not requesting managed internal broadband services. These checkboxes were selected solely to ensure compliance in the unlikely event that USAC determines that any element of the proposed solution constitutes software or right-to-use licensing that should be treated or supported similarly under Category 2 eligibility rules.

Per USAC E-Rate rules, “cost of eligible services” will be the highest valued criterion in the evaluation process; however, other criteria with a lesser value may also be considered.

Service providers proposing a temporary equipment loan for product demonstration and/or evaluation purposes are **required** to clearly state that such loans are of limited duration. Product demos extending beyond thirty (30) days must be explicitly authorized by both parties and provided at a fair market rate.

By submitting a proposal on the requested services herein, the vendor certifies its proposed services and/or products comply with Parts 47 Section 54.9 and 54.10 of the FCC rules which prohibits the sale, provision, maintenance, modification, or other support of equipment or services provided or manufactured by Huawei, ZTE, or any other covered company posing a national security threat to the integrity of communications networks or the communications supply chain. See https://www.usac.org/about/reports-orders/supply-chain/ for more details.

As required by Section 54.500(f) of Part 47 of the Code of Federal Regulations all offers in response to this solicitation **must** offer the lowest corresponding price (LCP) which is defined as the lowest price that a service provider charges to nonresidential customers who are similarly situated to a particular E-Rate applicant (school, library, or consortium) for similar services. See https://www.usac.org/E-Rate/service-providers/step-2-responding-to-bids/lowest-corresponding-price/ for more details.

Additional Considerations/Information

Applicant is subject to Montana STATE/LOCAL policy restrictions.

The language in this solicitation has been standardized: "must," "shall," "mandatory," and "required" indicate mandatory specifications that the Applicant expects in the proposed solution. Proposals failing to meet these will be disqualified. "Should" and "may" indicate desirable specifications. A mandatory requirement may be waived if all respondents fail to meet a mandatory requirement.

Applicant reserves the right to request Best and Final Offers (BAFOs) from one or more Offerors. BAFOs must be received by the date and time specified during discussions or negotiations. If an Offeror does not submit a BAFO by the stated deadline, Applicant will evaluate that Offeror based on its originally submitted proposal. If BAFOs are requested, Applicant reserves the right to conduct a subsequent evaluation and scoring of proposals, including any revised pricing and other information submitted in response to the BAFO request, in accordance with the evaluation criteria set forth in this solicitation.

Applicant reserves the right to waive any irregularities or informalities in the proposals received.

Offerors must accept that Applicant obligations are contingent on appropriation and availability of funds and may be reduced or terminated without penalty if funds are unavailable.

Applicant reserves the right to award all, part or none of the services set forth in this procurement. This procurement does not obligate Applicant until a valid agreement and/or valid Purchase Order is executed.

Applicant reserves the right, subject to applicable procurement requirements and E-Rate rules, to make non-material modifications to the awarded contract and to add or remove eligible locations, quantities, equipment, or services when such changes remain within the general scope of the original procurement.

Applicant may, at its sole discretion, extend the due date for the submission of proposals and any extensions shall be made via an addendum posted in the E-Rate Productivity Center (EPC).

The vendor submission is subject to open records requests and, as such, the records will be released in accordance with those policies. Vendors are encouraged to mark pages as “Proprietary” or “Confidential” as appropriate, but the entire submission may not be marked as such. Identifying information as “Proprietary” or “Confidential” does not guarantee that the information will not be released but will be

considered in determining whether the information is required to be released in accordance with the open records policies. Generally, pricing is not exempt from being publicly released.

By submitting a proposal, the Offeror certifies that no relationship exists between the Offeror and Applicant that would interfere with fair and open competition or create a conflict of interest.

Evaluation Criteria

These criteria are to be utilized in the evaluation of offers to be considered. Individual criteria have been assigned a weight to reflect relative importance. Vendors are encouraged to provide details in their proposals that address the following criteria.

Criteria	Description	Weight
E-Rate Eligible Costs	Total cost of E-Rate eligible components, including equipment, licenses, installation, shipping, and any associated eligible services, as applicable.	**25%**
E-Rate Ineligible Costs	Total cost of E-Rate ineligible components, including equipment, licenses, installation, shipping, and any associated ineligible services, as applicable.	**7%**
Technical Compliance and Functionality	Degree to which the proposed solution meets or exceeds the Applicant's functional requirements, performance needs, and technical specifications.	**15%**
Compatibility with Existing Network Infrastructure	The extent to which the proposed equipment and associated software can integrate with, interoperate with, and be managed alongside the Applicant's existing network environment without requiring significant replacement of existing infrastructure, additional licensing, or substantial operational changes.	**15%**
Management and Operational Efficiency	Ease of administration, centralized management capabilities, monitoring, reporting, and automation features that reduce operational burden.	**12%**
Compliance with Solicitation Requirements	Completeness of proposal, adherence to submission requirements, E-Rate compliance, and responsiveness to requested information.	**10%**
Prior Experience	Applicant's own past experience with this vendor's performance and service quality, if any	**10%**
Budget Consistency	Whether the proposed cost fits within the applicant's available Category 2 budget and 5-year Budget Allowance	**6%**