

NEW JERSEY SCHOOL BOARDS ASSOCIATION, TRENTON N.J.

REPORT OF CONTRACT AWARD to PROVIDE TELECOMMUNICATION AUDITS TO NJSBA MEMBERS

The New Jersey School Boards Association, hereinafter NJSBA, is requesting proposals from one or more interested Respondents/Vendors who will offer Telecommunications Audit Services to NJSBA's membership.

NJSBA is a local governmental entity, a body corporate and politic, with corporate succession, established by the New Jersey Legislature. All boards of education (local education agency) of the various school districts in New Jersey are members of NJSBA, *N.J.S.A. 18A:6-45*, approximately 581 in number. Additionally, New Jersey's public charter schools may voluntarily join NJSBA; approximately 80 are current members. Collectively, these public schools are referred to as "NJSBA's membership."

NJSBA has developed a program, NJSBA's TEC (Technology for Education and Career), that will enable its members to purchase technological tools and services at reduced costs. The program assists schools by providing cost-savings alternatives for creating, establishing and continuing the most current digital learning opportunities for students.

NJSBA is also a founding participant in the Future Ready Schools - New Jersey (FRS-NJ) project, together with the New Jersey Department of Education and the New Jersey Institute of Technology (NJIT). FRS-NJ is a certification program created to support New Jersey's public schools and to provide resources needed to implement digital learning and promote the skills, abilities, and capacities essential for student success in college and careers.

The successful Respondents will offer Telecommunications Audit Services to NJSBA's members:

- A. Review customers' current telecommunications invoices and related information to determine unnecessary billed services from the carrier(s), actively billed services that were disconnected or not used or incorrect billings on the account.
 - i. Review telecommunications agreements, contracts and tariffs;
 - ii. Review telecommunications invoices and bills to determine accuracy as reflected by comparison of billing documents;
 - iii. Determine whether billing errors exist and whether credits are due;
 - iv. Determine whether any taxes and other Government Fees are being incorrectly charged or assessed;
 - v. Investigate how long any unnecessary services were billed and identify possible recovery of past payments for the unnecessary services;
 - vi. Compare existing agreements regarding services and pricing with industry benchmarks for comparably sized customers;
 - vii. Submit an all-inclusive report to each customer specifying: financial recoveries in case of improper charging, a detailed list of any unnecessary services that the

customer will ask the carrier to disconnect at its discretion, advice on the securing of more advantageous pricing, contract terms and conditions regarding the delivery of telecommunications services and products, and meet with customer personnel to review, discuss, or modify report and aide in implementing any recommendations. Any actual changes to current service(s) will be at the discretion of the customer;

- viii. Services pricing must comply with *N.J.A.C. 5:34-7.30*, as applicable;
- ix. Successful Respondents must have the ability and resources necessary to complete all phases of the contract;
- x. Communicate with membership about the program to encourage participation; and
- xi. Reimburse NJSBA for its administrative expenses incurred in operating the program.

B. Equity:

Respondent agrees that it will assist all NJSBA members equally regardless of size or the complexity of its telecommunications program. Successful respondent will demonstrate in its proposal a detailed plan for how it will customize its approach to meet the needs of small, medium and large customers as well as charter schools.

“Small school districts” is defined as those with a student population of 1-749

“Medium school districts” is defined as those with a student population of 750-2,999

“Large school districts” is defined as those with a student population of 3,000+¹

“Charter school” is a school defined under the “Charter School Program Act of 1995” and operating pursuant to *N.J.S.A. 18A:36A-1, et seq.*

- i. The Respondent should demonstrate its willingness and ability to provide quarterly reports to NJSBA documenting number of members contacted; category of member as defined above; method of contact; number of members that responded to outreach; vendor services provided to the member; percentage of total telecommunications bill saved percentage of total budget saved total dollars saved; if unable to reduce costs of the member, reasons why; the agreements it has reached with NJSBA’s members, the level of activity for these agreements, the calculations showing the NJSBA administrative fees, and a pipeline report showing contacts with other members for which a contract has not yet been signed. See G Provide Reports, below.

Failure to demonstrate a continued and balanced effort to assist all NJSBA members with telecommunications savings will be grounds for immediate cancelation of the contract at NJSBA’s sole discretion.

¹ Based on the enrollment figures in the ASSA filed by the district(s) on Oct. 15 of the preceding year.

- C. Attendance at Meetings: The successful Respondent shall be required to attend meetings, remotely or in-person as needed, as requested by the members to assure quality delivery of the services, upon reasonable notice.
- D. Marketing Assistance: Respondent's marketing and partnering responsibilities should, at a minimum, include:
 - i. Assist NJSBA and its staff in educating the membership about NJSBA and the NJSBA TEC (Technology for Education and Career) program on telecommunications audits by assisting in the preparation of promotional materials and by providing other marketing assistance; providing presentations online and at local, regional and state-wide meetings/training opportunities, including the Annual Workshop Conference held in October at the Atlantic City Convention Center, Atlantic City, New Jersey;
 - ii. Develop a marketing plan in conjunction with NJSBA;
 - iii. Conduct all sales, promotions, presentations, inquiries and quotations for the telecommunications audit services they will be providing to school districts and charter schools;
 - iv. On at least a semi-annual basis, meet with NJSBA to review and evaluate the marketing plan and to ensure the terms of the agreement are being upheld.

NJSBA will provide the following marketing support to promote the partnership:

- i. Inclusion of the partnership on the TEC area of NJSBA's website;
 - ii. Inclusion of the partnership on all TEC print materials;
 - iii. Inclusion of the partnership in all TEC promotions, including promotion at Future Ready events and other conferences;
 - iv. Social media promotions (Facebook/Twitter) announcing the new services available within the TEC program;
 - v. Hosting of a product webinar, as part of the TEC webinar series, presented live and included on the NJSBA website.
- E. Customer Service: The successful Respondent shall provide ongoing and timely Customer Service to members, answering general questions, facilitating use of any and all services provided, explaining benefits of the program, and addressing related issues raised by membership. Include the number of full-time and part-time employees in the Respondent's in-house customer service department. In addition, include a list of all staff member names, titles, whether the employee is full-time or part-time and a resume for each employee in the Respondent's in-house marketing department.
- F. Preparing Proposals: The successful Respondent shall provide proposals to New Jersey public school districts and charter schools based on the requests for telecommunications services audits.

- G. Provide Reports: The successful Respondent shall provide quarterly accurate reports to NJSBA including all items referenced in B. Equity, above. Reports shall be timely and accurate and include all activity within each New Jersey school district and charter school. It is the Respondent's obligation to keep all pricing up-to-date and provide NJSBA with most current pricing lists. Respondents shall, at their sole expense, maintain precise and accurate records of purchases made by NJSBA and its members under this agreement. NJSBA reserves the right to audit Respondent's records of accounting at any time during the duration of the agreement.

NJSBA will select one or more Respondents through the competitive contracting process. The proposal to offer the telecommunications audit services shall be in accordance with the attached Request for Proposals and fully comply with the following:

- i. Public School Contracts Law *N.J.S.A. 18A:18A-1 et seq.*, *N.J.S.A. 18A:18A-5e*, *N.J.A.C. 5:34-4 et seq.* and *N.J.A.C. 5:34-7 et seq.* and 5:34-7.30.
- ii. Federal and New Jersey State law and regulations.
- iii. New Jersey Open Public Records Act, *N.J.S.A. 47:1A-1 et seq.*

All Respondents must demonstrate that they have:

- Business Registration Certification: Document that Respondent holds a current New Jersey Business Registration Certificate.
- At least ten (10) years organizational experience in providing telecommunications audit services with specific details relating to these services being provided to the public, school/municipal/county/state experience preferred.
- A deep and practical understanding of New Jersey Public Contracts Law, *N.J.S.A. 18A:18A-1 et seq.* and how it intersects with offering telecommunication auditing products and services to public contracting entities.
- A high-level of familiarity with the needs of public schools in the provision of telecommunications services for both large and small school districts. Applicants should possess a practical understanding of the service's functionality, capability, market cost and product lifecycles.
- An established business presence in New Jersey. A list of long-standing client references in New Jersey will demonstrate your aptitude and ability, as well as your commitment to the NJSBA's membership.
- An actual, physical presence in New Jersey, as the partner may be required, on short notice, to meet with members as reasonably necessary; to attend individual Board of Education meetings as reasonably necessary; to conduct in-person training sessions for NJSBA's membership; and to meet with the NJSBA's executive team.
- Demonstrated experience marketing to local government entities.
- Customer service experience and sufficient staffing resources experienced in providing customer service to local education agencies.

Specific Evaluation Criteria

The following evaluation criteria and weighting shall be used to formally evaluate all proposals and to subsequently determine a final contract award.

- i. Pricing (20%) – Each Respondent must propose a pricing structure and explain the pricing to be charged to members for telecommunication audit services, and steps necessary to timely implement all aspects of this RFP. The pricing proposal should include an explanation and rational of your pricing, provide the estimate(s) of quantities used in your proposal, as quantities are unknown at this time, rebates, pricing incentives, and large volume incentives. Respondent agrees that it will assist all NJSBA members equally regardless of size or the complexity of its telecommunications program. Successful respondent will demonstrate in its proposal a detailed plan for how it will customize its approach to meet the needs of small, medium and large school districts as well as charter schools.
- ii. Fee Proposal (10%) – Each Respondent must propose an administrative fee structure, to be paid to NJSBA, for all telecommunication audit services provided. Your fee proposal should include an explanation for the rational of your fee structure.
- iii. Client References/Reputation (20%) – Overall quality of client references. NJSBA will also consider the duration of Respondent's relationship with the references provided. Long-standing client relationships will be viewed more favorably than newer relationships; school/municipal/county/state references preferred.
- iv. Experience of Personnel (20%) – Does the Respondent document the availability and quality of personnel with the experience and knowledge to successfully manage the implementation and delivery of services as described in the RFP?
- v. Physical presence in New Jersey (10%) - Does the Respondent have an office in New Jersey? If not, what is the geographic distance from the NJSBA headquarters in Trenton, NJ? How much notice will be required to attend meetings with the NJSBA or its membership? Will you charge travel fees to attend such meetings?
- vi. Overall Quality of Proposal - (10%) - Active or passive method of service delivery; knowledge of relevant, eligible technologies and services; proposed training delivery, including in-person and by webinar, proposed delivery of services timeline.
- vii. Demonstrated understanding of unique challenges faced by Membership (10%) – This includes challenges related to budgeting; procurement requirements under the Public Schools Contracts Law, *N.J.S.A. 18A:18A-1 et seq.*, short and long-term technology planning and school board member education on both the Telecommunications Audit Service and any eligible services and equipment.

REPORT OF AWARD: NJSBA received three proposals in response to its request for bids: Fortune Consulting, Walter A. McDermott Telephone Auditing Services, and Troy and Banks,

Based upon proposals received NJSBA determined to award the contract to the most advantageous proposal, price and other factors considered. *N.J.A.C. 5:34-43(d)*. NJSBA applied the Specific Criteria to the three proposals as follows:

Fortune Consulting, Eatontown, NJ

Total Grade: 87.8/100

A. Pricing Proposal (20%) – Each Respondent must propose a pricing structure and explain the pricing to be charged to members for telecommunication audit services, and steps necessary to timely implement all aspects of this RFP.

Response provided competitive pricing for districts. 22.5%

Total points: 16.4

B. Fee Proposal (10%) – Each Respondent must propose an administrative fee structure, to be paid to NJSBA, for all telecommunication audit services provided. Your fee proposal should include an explanation for the rational of your fee structure. 3%

Total points: 8

C. Client References/Reputation (20%) – Overall quality of client references. NJSBA will also consider the duration of Respondent's relationship with the references provided. Long-standing client relationships will be viewed more favorably than newer relationships; school/municipal/county/state references preferred.

Several school districts, Woodbridge municipality.

Total points: 17.4

D. Experience of Personnel (20%) – Does the Respondent document the availability and quality of personnel with the experience and knowledge to successfully manage the implementation and delivery of services as described in the RFP?

Experienced NJ staff.

Total points: 19.2

E. Physical presence in New Jersey (10%) - Does the Respondent have an office in New Jersey? If not, what is the geographic distance from the NJSBA headquarters in Trenton, NJ? How much notice will be required to attend meetings with the NJSBA or its membership? Will you charge travel fees to attend such meetings?

Offices in Eatontown

Total points: 8.8

F. Overall Quality of Proposal - (10%) - Active or passive method of service delivery; knowledge of relevant, eligible technologies and services; proposed training delivery, including in-person and by webinar, proposed delivery of services timeline.

Will serve all size districts equally. Well defined audit plan. Internal helpdesk scaled to size.

Total points: 9

G. Demonstrated understanding of unique challenges faced by Membership (10%) – Demonstrated understanding of unique challenges faced by Membership (10%) – This includes challenges related to budgeting; procurement requirements under the Public Schools Contracts Law, N.J.S.A. 18A:18A-1 *et seq.*, short and long-term technology planning and school board member education on both the Telecommunications Audit Service and any eligible services and equipment.

Experience with NJ districts.

Total points: 9

Walter A. McDermott Telephone Auditing Services, Ridgewood NJ

Total Grade: 85.2/100

A. Pricing Proposal (20%) – Each Respondent must propose a pricing structure and explain the pricing to be charged to members for telecommunication audit services, and steps necessary to timely implement all aspects of this RFP.

Competitive pricing 25%

Total points: 15.8

B. Fee Proposal (10%) – Each Respondent must propose an administrative fee structure, to be paid to NJSBA, for all telecommunication audit services provided. Your fee proposal should include an explanation for the rational of your fee structure . **3%**

Total points:9.2

C. Client References/Reputation (20%) – Overall quality of client references. NJSBA will also consider the duration of Respondent's relationship with the references provided. Long-standing client relationships will be viewed more favorably than newer relationships; school/municipal/county/state references preferred.

Multiple NJ districts.

Total points: 17.4

D. Experience of Personnel (20%) – Does the Respondent document the availability and quality of personnel with the experience and knowledge to successfully manage the implementation and delivery of services as described in the RFP?

Experienced NJ staff.

Total points: 17.2

E. Physical presence in New Jersey (10%) - Does the Respondent have an office in New Jersey? If not, what is the geographic distance from the NJSBA headquarters in Trenton, NJ? How much notice will be required to attend meetings with the NJSBA or its membership? Will you charge travel fees to attend such meetings?

Office headquartered in Ridgewood NJ

Total points: 9.4

F. Overall Quality of Proposal - (10%) - Active or passive method of service delivery; knowledge of relevant, eligible technologies and services; proposed training delivery, including in-person and by webinar, proposed delivery of services timeline.

Grammatical errors and typos.

Total points: 7.4

G. Demonstrated understanding of unique challenges faced by Membership (10%) – Demonstrated understanding of unique challenges faced by Membership (10%) – This includes challenges related to budgeting; procurement requirements under the Public Schools Contracts Law, *N.J.S.A. 18A:18A-1 et seq.*, short and long-term technology planning and school board member education on both the Telecommunications Audit Service and any eligible services and equipment.

Successful record in many districts.

Total points: 8.8

Troy and Banks, Inc., Buffalo NY

Total Grade: 79/100

A. Pricing Proposal (20%) – Each Respondent must propose a pricing structure and explain the pricing to be charged to members for telecommunication audit services, and steps necessary to timely implement all aspects of this RFP. **Charging fee on refund and future savings.**

Total points: 15.8

B. Fee Proposal (10%) – Each Respondent must propose an administrative fee structure, to be paid to NJSBA, for all telecommunication audit services provided. Your fee proposal should include an explanation for the rationale of your fee structure

2%

Total points: 7.4

C. Client References/Reputation (20%) – Overall quality of client references. NJSBA will also consider the duration of Respondent's relationship with the references provided. Long-standing client relationships will be viewed more

favorably than newer relationships; school/municipal/county/state references preferred.

Numerous public school references in NJ through ESCNJ.

Total points: 16

- D. Experience of Personnel (20%) – Does the Respondent document the availability and quality of personnel with the experience and knowledge to successfully manage the implementation and delivery of services as described in the RFP?

Experienced team.

Total points: 19

- E. Physical presence in New Jersey (10%) - Does the Respondent have an office in New Jersey? If not, what is the geographic distance from the NJSBA headquarters in Trenton, NJ? How much notice will be required to attend meetings with the NJSBA or its membership? Will you charge travel fees to attend such meetings?

Personnel in NJ, works with ESCNJ.

Total points: 5.8

- F. Overall Quality of Proposal - (10%) - Active or passive method of service delivery; knowledge of relevant, eligible technologies and services; proposed training delivery, including in-person and by webinar, proposed delivery of services timeline.

Offers catalogue of services, through ESCNJ, in NJ.

Total points: 7.2

- G. Demonstrated understanding of unique challenges faced by Membership (10%) – Demonstrated understanding of unique challenges faced by Membership (10%) – This includes challenges related to budgeting; procurement requirements under the Public Schools Contracts Law, *N.J.S.A. 18A:18A-1 et seq.*, short and long-term technology planning and school board member education on both the Telecommunications Audit Service and any eligible services and equipment.

Overall understanding.

Total points: 7.8

Ranking: Fortune; McDermott; Troy and Banks

Recommendation: Award contract to Fortune

Committee members: Cynthia J. Jahn, Esq., General Counsel; Michael Vrancik, Director, Governmental Relations; John Faford, Director, Finance; Kathleen Asher, Esq., Counsel; Lou Schimenti, Products and Services Manager and Michael Esolda, IT Products Consultant.

Dated: September 20, 2019