24031C29

Materials Handling Equipment and Related Supplies

Issue Date: 4/10/2024
Questions Deadline: 6/15/2029 12:00 AM (CT)
Response Deadline: 6/29/2029 02:00 PM (CT)

Contact Information

Contact: Cassandra Holmes
Address: Purchasing
Administration Building
204 W South St
Leander, TX 78641-1719
Phone: 1 (512) 570-0614
Fax: 1 (512) 570-0607
Email: Cassandra.Holmes@leanderisd.org

Event Information

Number:	24031C29
Title:	Materials Handling Equipment and Related Supplies
Type:	RFPC - Continuous
Issue Date:	4/10/2024
Question Deadline:	6/15/2029 12:00 AM (CT)
Response Deadline:	6/29/2029 02:00 PM (CT)
Notes:	Leander Independent School District (known herein as "LISD" or "District") is accepting proposal responses from vendors interested in providing the following products or services: **Materials Handling Equipment and Related Supplies** in accordance with the instructions, terms and conditions, and requirements/specifications contained in this solicitation. This is a continuous opportunity with the submission deadline on **Friday, June 29, 2029 at 2:00 p.m**. Leander ISD reserves the right to reject any or all proposals.

Ship To Information

Contact: To be provided at time of order

Billing Information

Contact: Accounts Payable
Address: 204 W South St
P.O. Box 218
Leander 78646-0218
Phone: (512) 570-0000
Email: accounts.payable@leanderisd.org

Bid Activities

Issue Date	4/10/2024
Question Cutoff Date	6/15/2029 5:00:00 PM (CT)
Submissions Due	6/29/2029 2:00:00 PM (CT)

Bid Attachments

LISD General Terms FINAL rev2 20221118.pdf View Online

LISD General Terms for Purchasing Solicitations and Contracts v.2, effective date November 18, 2022

Requested Attachments

Form W-9

(Attachment required)

REQUIRED - Vendors must complete and upload, in PDF format, the most current version W-9. (Please DO NOT password protect uploaded files).

Bid Attributes

1 Solicitation Overview and Description

The Leander Independent School District ("LISD" or "District") invites qualified vendors to submit proposal responses for **Materials Handling Equipment and Related Supplies** in accordance with the instructions, terms and conditions, and requirements/specifications contained in this solicitation. Proposal responses will only be received before the time and date indicated.

Electronic Responses
Responses are to be submitted through this electronic procurement program. Though the District is required to allow for hard copy responses, the proposers are encouraged to use this program due to the efficiencies it will allow. If the proposer is having difficulty working within the solicitation, please contact the LISD Purchasing Department at 512.570.0613 during regular District business hours or email Bid Contact email listed in the Events Detail tab. Please note that the District's Purchasing Department will attempt to respond as soon as possible, however, the potential proposer is responsible for ensuring enough time is still available to respond before the closing time for the solicitation.

Solicitation Description
The purpose of this solicitation is to establish an awarded vendor or vendors to provide the District with resources to purchase materials handling equipment that are in current inventory through pre-qualified vendors, using a pre-determined quote process to all awarded vendors as the District's material handling needs occur. Note that the awarded contract is one of multiple resources for material handling purchases and no guarantees of any material handling purchases will be made by the District.

☐ I understand the requirements
(Required: Check if applicable)

2 General Information

Governing Documents
This Solicitation and anticipated award(s) shall be governed by the following documents unless an exception is otherwise taken within this solicitation. The first three documents are incorporated by reference only, and are not attached as part of this Solicitation. Click on the links below to obtain a copy of these documents, or contact the LISD Buyer listed on the solicitation.

- Texas Education Code 44.031 - 44.047
- LISD Policy CH(LEGAL) - *Purchasing and Acquisition*
- LISD Policy CH(LOCAL) - *Purchasing and Acquisition*
- LISD *General Terms for Purchasing Solicitations and Contracts*, Version 2, effective date of November 18, 2022 (included with this solicitation in Attachments)

Contact with District Personnel
Contact with trustees, district administrators or employees of the District outside the LISD Purchasing Office regarding this solicitation is prohibited during the solicitation process unless directed by the Buyer or other District Purchasing officers. Respondents who fail to adhere to this requirement risk having their response disqualified.

Conflict of Interest: Vendor Disclosure of Certain Relationships with Local Government Officials
Any individual or business entity that contracts or seeks to contract for the sale or purchase of property, goods, or services with Leander ISD must file a "Vendor Conflict of Interest Questionnaire" ("CIQ") with the LISD Purchasing Department in accordance with Texas Local Government Code Chapter 176, not later than the 7th business day after the recipient becomes aware of facts that require filing. This requirement applies to a person who is an agent of a Vendor in the Vendor's business with the District. Forms are also posted at the Texas Ethics Commission's website https://www.ethics.state.tx.us/data/forms/conflict/CIQ.pdf.

Conflict of Interest: District Employees

Employee Relationship
In reference of LISD policies CH(LOCAL) *Purchasing and Acquisition*, and DBD(LOCAL) *Employment Requirements and Restrictions*, all proposers must disclose the name of any LISD employee who owns, directly or indirectly, an interest in the proposer's firm or any of its branches. Failure to provide such information may be grounds for

disqualification of the response or cancellation of a contract resulting from this request.

Employee Owned
The purchase of goods or services from a business owned in whole or in part by a District employee shall not be permitted. This provision includes any individual actively receiving compensation as a substitute or with any other temporary employee status. The purchase of goods or services from a business owned in whole or in part by a person related to a District employee by blood (consanguinity) or by marriage (affinity) that results in the District employee receiving compensation directly or indirectly shall be permitted only when:

- The District employee does not exercise discretion in connection with contracts, purchases, payments, claims, or other pecuniary transactions related to the services or equipment supplied by the business, in which case the business shall not be permitted to sell services or equipment to the District employee's department and department affiliates or campus and campus feeder pattern, as applicable, for as long as the employee continues in the department or campus position;
- The business transaction has been approved by the Superintendent; and
- The purchase of services or equipment has been contracted through a documented competitive process.

Requests for Historical Information of Previous District Contracts and/or Purchases
The District is required to provide documentation as requested through the Texas *Public Information Act* as found in the Texas Government Code 552. Requests for such information must go through the established LISD PIA process. The buyer for this solicitation will not be able to provide this type of information directly. Note that there may be a cost for such information and the turnaround could be up to ten (10) District business days. Information deemed confidential by the State's Office of the Attorney General will not be released at any time.

Closing of Request for Proposals
Unless legally required to do so, closings of RFPs will not be made public. No names of the respondents or any information related to the responses will be release prior to the award.

Incomplete Proposal Responses
The proposer is responsible with ensuring all required information and submittals are included with the proposal response prior to the closing of the RFP. Minor technicalities such as documents that are not pertinent for an award may be waived only by the LISD Purchasing Department and the assigned buyer.

Withdrawal of Proposal Responses
No proposals may be withdrawn for a period of forty-five (45) days subsequent to the closing time for receipt of proposal responses without the prior written consent of the District's Purchasing Department.

Rejection of Proposals
The District reserves the right to reject any and all proposals, to waive any irregularities in any proposal (except time of filing), to request clarification or additional information from any firm and to select one or more firms, as the District may determine to be in best interest of the District.

☐ I understand the requirements
(Required: Check if applicable)

3 Electronic Solicitation Program Navigation

The following tabs may be present within this solicitation. Below is an explanation and purpose for each tab.

***Event Details* Tab**
This tab provides the time requirements for the responses, the bid contact person, the ship and bill to information. The time and date the responses are due by is provided within this tab.

***Questions* Tab**
All requests for clarification, interpretations, and/or questions for this solicitation shall be submitted and answered through the ”Questions" tab and clicking on "Ask Question". All requests must be submitted prior to the question cutoff date indicated inside this tab. Late or delinquent requests will not be entertained or answered. The respondent is discouraged from contacting the District’s buyer directly unless necessary.

Each question, clarification or interpretation request must include all pertinent information required to receive a response. Failure to provide all information may delay a response from the District. The District reserves the right to inform the requester that the response to their request will be submitted through an addendum to all interested vendors and not be addressed directly through their request.

Note that any and all verbal discussions are considered non-binding.

***Attachments* Tab**
Most solicitations will provide one or more documents that will be pertinent to the solicitation and potentially the award. The vendor may be required to have thoroughly review and read this document.

***Attributes* Tab**
This tab provides specific information related to the solicitation and may be required of the vendor to affirm they reviewed and understand each time listed. If the attribute contains a red asterisk next to the checkbox or entry cell, the proposer must enter the appropriate information or respond. If any attributes that are required does not have a response, the proposer will not be able to submit the response until they are completed.

***Line Items* Tab**
Solicitations will require some form of pricing if this tab is present. The proposer should review the *Pricing Information* attribute for a better understanding of how the District wants the pricing to be provided.

***Response Attachments* Tab**
This tab provides the means for the proposer to upload documents that are required and/or appropriate for the response.

***Response Submission* Tab**
This tab is the last step in submitting a response to a proposal. For the system to allow for a submittal, all required information must be included and completed. The individual responding is to provide their full name and email address.

☐ I understand the requirements
(Required: Check if applicable)

4 Request for Clarification, Interpretation, and Questions

All requests for clarification, interpretations, and/or questions for this solicitation shall be submitted and answered through the ”Questions” tab within this electronic solicitation. All requests must be submitted prior to the date indicated as the ”Question Cutoff Date”. Only fully completed requests for valid and current solicitations will receive a response. Late or delinquent requests will not be entertained or answered. Each question, clarification or interpretation request must include all pertinent information required to receive a response. Failure to provide all pertinent information may delay response. The District reserves the right to inform the requester that the response to their request will be submitted through an addendum to all interested vendors and not be addressed directly through their request.

Respondent is discouraged from contacting the District’s Buyer directly unless necessary.

☐ I understand and accept
(Optional: Check if applicable)

5 Continuous Solicitation - Multiple Award - General Information

This solicitation is considered a "Continuous Solicitation - Multiple Award". This type of solicitation and award provides the District the means to provide the District end users an opportunity to identify and purchase items or services that best fits their needs through various awarded vendors while meeting the state's competitive bidding requirements.

The District reserves the right to use other purchasing methods to meet its needs if it is determined the needs can best be met through other procurement processes, specifically if the expenditure for a specific program warrants a more formal competition.

Continuous Solicitation. The term "continuous" means that the closing date for submitting a response can be a date equal to or near the term end of the potential awards (e.g., award term ends June 30, 2026 and the RFP closes May 30, 2026). Vendors are encouraged to submit responses as soon as possible. As proposal responses are received or on a periodic basis, they will be opened, evaluated, and either accepted or rejected by the district, based on the criteria outlined within the request for proposal. Awards will be made throughout the open period of this solicitation and will be made upon acceptance of a proposal response. The respondent's point of contact will be notified of the district's decision via written notification.

Multiple Award. The term "multiple award" means awards will be made to multiple vendors during the solicitation offering period. There will not be hierarchy or tier level to the awards. The District's end users will be the sole determinant as to which awarded vendor to purchase from and The District reserves the right and encourages the end users to request quotes from more than one vendor.

Intent of the Awarded Contract. To receive an award, the respondent must provide the product and/or service identified in this solicitation. If not, no award will be made and the response rejected.

Evaluation of the Responses. The evaluation process for this solicitation will be reviewed by the appropriate District staff to ensure awards are made in accordance with the requirements of the solicitation. The evaluation will be done on a pass/fail basis (see *Selection and Evaluation Criteria* for further information).

- Awards. If the respondent's response meets the requirements of the solicitation, the respondent will be notified electronically of such award.
- Rejection of Response. If the respondent's response is rejected, and based on the reason for the rejection, the respondent may be able to provide the missing information, documentation, or other action(s) necessary, for re-consideration by the District. Rejection for not meeting the intent is a final decision. The District shall be the sole determinate of the acceptance or rejection of a response.

Pricing. Unless identified within the solicitation as a requirement, pricing in some form is encouraged (e.g., website pricing, catalog with pricing, discount from list, etc.). This information will be provided within the *Line Item* tab. The respondent should be aware that, if awarded, they may have competition and the best offer presented may receive the order without discussion.

Documentation. As necessary, a respondent can provide documentation to support their response. This is to be done under the *Response Attachment* tab.

Use of Federal Funds. This solicitation is issued utilizing the guidelines presented in the *Code of Federal Regulations* (CFR), 2 CFR 200. As such, the awarded contracts can be used by the departments or campuses with federal funds. Some federal programs will require quotes as normal procedure. This allowance is based on the awarded vendor remaining active in SAM.gov and not being suspended or debarred by the federal government.

Dollar Limits per Purchase or in Aggregate. Though an award of a contract to a respondent will meet the State's competitive bidding requirements, the District must also consider its fiduciary responsibility of ensuring the best interest of the District is met with every purchase. As such, larger, high-dollar purchases will be discouraged from utilizing a multiple award contract without some further competition such as multiple quotes from multiple awarded vendors. The District reserves the right to determine what is considered an acceptable limit for a purchase before quotations are necessary. This dollar limit will be considered an internal procedure and is not contractual for the awarded vendors. If it is determined that quotes will be required, the District does not guarantee any awarded vendor the right to be contacted for a request or submission.

The District may also consider that the annual aggregate dollar amount for a specific category of purchases

warrants its own solicitation and award vendor(s) based on the competitive advantages the District will receive from a more formal procurement method. If so determined, the District will notify the currently awarded vendors of the change. The District will allow for purchases to continue through the current contract award until an award has been made for the new solicitation. The originally awarded vendors will be notified of the cancelation date of the previous award and no more purchases can be allowed for the category through the original contract.

☐ I understand the requirements
(Required: Check if applicable)

6 **Term of the Awarded Contract - Performance Based**

It is anticipated that the awarded contract for this solicitation shall be the date the respondent is awarded through **Friday, June 29, 2029**. This a multiple year, performance based contract. The awarded respondent's (Contractor) performance is critical to the success of the contract for the full term.

To ensure the level of performance is satisfactory, the District may utilize periodic reviews related to contractual requirements and professional expectations. The District has the right to terminate the Contractor for cause. In the event that the Contractor is not meeting the requirements of the contract, the District may choose to counsel the company and its lead personnel. If after counseling the performance has not improved, the District has the right to terminate the contract in whole or in part for cause and the District may utilize all remedies available under law and/or by contract terms, which may include debarment of the Contractor from future awards.

☐ I understand the requirements
(Required: Check if applicable)

7	**Interlocal Agreement with Other School Districts**

Membership

Leander ISD is a member in good standing of the of the Central Texas Purchasing Alliance (CTPA), an alliance of 200+ school districts in Texas representing millions of students, sharing information, services and contractual opportunities. CTPA is an alliance created in accordance with Section 791.001 of the Texas Government Code through interlocal agreements.

Adoption of Awarded Contracts

In support of this collaborative effort, all awards made by LISD may be adopted by other active CTPA member districts. By adopting a contract from another CTPA member district, the adopting district has met the competitive bidding requirements established by the Texas Education Code, Section 44.031(a)(4) and as required by the adopting district's policies. There is no obligation on either party to participate unless both parties agree. The goods and services provided under the contract will be at the same or better contract pricing and purchasing terms established by the originating district.

Document Sharing between Members

To assist an adopting member district in establishing their supporting, due diligence documentation, the awarded respondent's response and related documents owned by the originating district may be shared without prior notification to the awarded vendor, unless the vendor at the time of their response to the original solicitation clearly annotates that such sharing of their response is to not occur without prior permission of the vendor.

Adopted Contract Management

The adopting district shall be responsible for the management of the new contract and all payments to the contracted vendor. The originating district shall have no responsibilities under the new contract agreement. Upon adoption of the contract by the adopting CTPA member district, the original term of the contract and any renewal or extension options allowed under the original contract shall then transfer to the adopted contract, and such renewals options may be executed by the adopting member district at its sole discretion and independently of the originating member district's decision to execute such renewal options on the original contract.

☐ I understand the requirements
(Required: Check if applicable)

8 Cooperative Contract Award(s)

The District utilizes cooperative entities to which the District has a current interlocal agreement. The items/services listed in this solicitation will be awarded based on the pricing provided in this RFP. However, if awarded any items, and the proposer has an active award through a cooperative, the District may utilize the cooperative contract to purchase items not included in awarded contract. If the proposer does have an award(s), it is requested that proposer provide the following information for future reference and consideration.

- **Cooperative Entity Name**
- **Contract Title**
- **Contract Number**
- **Contract Start Date**
- **Contract End Date**

(Optional: Maximum 1000 characters allowed)

9 Solicitation Timeline

Solicitation timeline can be viewed in the Activities tab. All dates are subject to change.

☐ I understand the reqjuirements.
(Required: Check if applicable)

10 Evaluation Criteria

The District will evaluate the initial response documentation from the respondent based on the criteria listed below. All criteria is considered "Pass/Fail" and will have no weighted value. A "Pass" will allow for the response to be considered further, where a "Fail" will remove the response from consideration. To be awarded, a respondent must receive a "Pass" on all criteria.

- **Submittal**: All required information was provided with the response (required for electronic submittal)
- **Intent**: The respondent demonstrated the ability to meet the requirements of a K-12 Texas school district, and meets the District's intended purpose through the contract award.
- **Pricing**: Pricing will not be considered until post-award.
- **References:** The references provided by the respondent are appropriate for consideration.

The District reserves the right to include additional evaluation criteria beyond the initial review to include, but not limited to the criteria identified in Texas Education Code 44.031(b). The District reserves the right to add additional evaluation steps, such as interviews, demonstrations, sample products, etc., to determine which response best meets the needs of the District. The District reserves the right to negotiate price, final terms and conditions, and/or any relevant factors prior to award.

☐ I understand the requirements
(Required: Check if applicable)

11	**Additional Affirmations** By submitting a response to this solicitation, the Proposer affirms that they agree to the following requirements. *Criminal History*. The proposer affirms they will accept full responsibility for adhering to any criminal history requirements under state law, including but not limited to Texas Education Code Section 22.0834. At no time shall firm or firm's employees, agents or subcontractors have unsupervised contact with students. *Boycott of Energy Companies or Nondiscrimination of Firearm Entities/Trade Associations*. As required by Texas Government Code Chapter 2274, a vendor, by submitting a response to this solicitation with a value of $100,000 or more, must certify that their company does not have a practice, policy, guidance, or directive that boycotts energy companies based on company practices or discriminates against a firearm entity or firearm trade association, and will not during the term of any contract with the District . Excluded from this requirement are vendors who are sole proprietors or have ten (10) or less employees. *Notice of Felony Conviction*. Texas Education Code, Section 44.034(a-b), Notification of Criminal History, requires that a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. A firm that is a publicly-held corporation is not required to report or provide notice. If there are convictions to report, the notice is to be provided as a separate document within the proposal response. If there are no applicable convictions to report, no notice is required. If a felony conviction of an owner or operator of the entity must be reported, the notice must include the name of the individual, their title, and a general description of the conduct resulting in the conviction of a felony. The District may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice or misrepresented the conduct resulting in the conviction. The District must compensate the person or business entity for services performed before the termination of the contract. ☐ I affirm understanding and will comply *(Required: Check if applicable)*
12	**W-9 Form to be Completed and Submitted with a Response** To expedite entry of an awarded company's information into the District's finance system, a respondent is required to complete and/or upload the most current version of the W-9 form provided by the Internal Revenue Service (IRS) into the "Response Attachments" tab. A response cannot be submitted until the W-9 is uploaded. ☐ I understand the requirements. *(Required: Check if applicable)*
13	**Additional Documentation** The proposer is allowed to include additional documentation under the *Response Attachments* tab as deemed applicable to provide additional information to the District during the evaluation process. Such documentation should provide clarity and information to allow for better understanding of what is being proposed. The District does not guarantee that these documents will be reviewed or provided to the evaluation team. The proposer is warned against providing too much documentation that could be considered exorbitant and not relevant to the process as this may distract from the information needed by the District to made a clear judgement of the system. ☐ I understand the requirements *(Required: Check if applicable)*

14 **Materials Handling Equipment**

The District is looking to purchase materials handling equipment and related supplies to transport, process, store and/or package materials. The respondent is to indicate the types of equipment that are normally available.

- **Storage and handling supplies:** *bins and drawers, pallets, pallet stacking frames, storage racks, wire decking, and conveyors*
- **Industrial trucks and machines:** *forklifts, shrink wrap machines, order pickers, pallet jacks/pump trucks (manual/electric), hand trucks, scissor lifts*

This District reserves the right to modify this list as needed.

☐ Storage and handling equipment

☐ Industrial trucks and machines

(Required: Check all that apply)

15 **Delivery of Equipment**

The District understands that some products/equipment have long lead times that can change based on unexpected market conditions. For this solicitation and the anticipated contract award, the proposer is to provide to the best of their knowledge and understanding of the market, the expected turnaround for delivery for each item based on the date of the purchase order. Each line item included in this solicitation includes an item attribute for this required information.

☐ I understand the requirements

(Required: Check if applicable)

16 **Proposal Contact Information**

The proposer is to provide the individual that will be considered the point-of-contact for the company's proposal response. The contact information is to include:

- **Contact Name**
- **Title**
- **Phone Number**
- **Email Address**

(Required: Maximum 1000 characters allowed)

17 **References**

It is important that the District work only with proposers that will service the needs and best interest of the District to the best of their abilities. To ensure this, all proposers are required to provide a minimum of three (3) references of clients that have done business with the proposer's company in the last two (2) years. The references should be familiar with the proposer's work, billing, and post-completion support of the product or services provided. The District reserves the right to ask for additional clients or reject any that are not appropriate to provide information or feedback in the reference process. The information provided in the references is to be complete and up-to-date to be considered.

Proposers are encouraged to provide Texas independent school districts when possible. Additional references for the proposer can be provided as a uploaded document.

Required information for each reference provided:

- Entity / Company name
- Main / Corporate Address / City / State / Zip Code
- Contact name
- Contact phone number
- Contact email address
- # of Years as a client
- The most recent product/work provided by proposer (month/year)

☐ I understand the requirements
(Required: Check if applicable)

18 **Reference #1**

Provide the required information for this reference.

(Required: Maximum 1000 characters allowed)

19 **Reference #2**

Provide the required information for this reference.

(Required: Maximum 1000 characters allowed)

20 **Reference #3**

Provide the required information for this reference.

(Required: Maximum 1000 characters allowed)

21 **Certification and Submittal**

As an authorized representative of the stated company and by electronically submitting a response to this solicitation, I affirm and certify that my company will meet or exceed all requirements stated herein.

☐ I certify and affirm acceptance
(Required: Check if applicable)

Bid Lines

1 Industrial trucks and machines (forklifts, pallet jacks, scissor lifts, similar related items)
(Response required)

Total: %

Item Notes: State the minimum discount percentage % off published prices.
If no discount is offered, enter 0.
Use Supplier Notes to provide additional information.

☐ No bid
☐ Additional notes *(Attach separate sheet)*

Supplier Notes:

Item Attributes

1. Delivery of Equipment

The proposer is to provide to the best of their knowlwdge and understanding, the expected turnaround time (in weeks) for delivery.

(Optional: Maximum 1000 characters allowed)

2 Storage and handling supplies (bins and drawers, pallets, pallet stacking frames, storage racks)
(Response required)

Total: %

Item Notes: State the minimum discount percentage % off published prices.
If no discount is offered, enter 0.
Use Supplier Notes to provide additional information.

☐ No bid
☐ Additional notes *(Attach separate sheet)*

Supplier Notes:

Item Attributes

1. Delivery of Supplies

The proposer is to provide to the best of their knowlwdge and understanding, the expected turnaround time (in weeks) for delivery.

(Optional: Maximum 1000 characters allowed)

3 Preventative Maintenance Agreement Option

Quantity: 1 UOM: EA Price: $ Total: $

Item Notes: Indicate the product brand and frequency of preventative maintenance in the Supplier Notes section.

Supplier Notes:

- ☐ No bid
- ☐ Alternate specification *(Attach separate sheet)*
- ☐ Additional notes *(Attach separate sheet)*

Supplier Information

Company Name:

Contact Name:

Address:

Phone:

Fax:

Email:

Supplier Notes

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

Print Name

Signature