



# Canutillo Independent School District

7965 Artcraft Rd.  
El Paso, Texas 79932

Mailing Address: PO Box 100  
Canutillo, Texas 79835

**Ron Gatlin**  
Purchasing Agent

Voice (915) 877-7426  
Fax (915) 877-7415  
rgatlin@canutillo-isd.org

## MEMORANDUM

TO: Members of the Board of Trustees

FROM: Ron Gatlin, Purchasing Agent

DATE: November 6, 2013

SUBJECT: Renewal of the Shore Tel Support for Telephony System

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As stated in Board Policy CH (Local), any purchase that costs or aggregates to a cost of \$10,000 or more shall require board approval before a transaction may take place. This request is to approve the Renewal of the Shore Tel Support for Telephony System with Plan B Networks in the amount of \$11,442.37. The DIR-SDD-1603 purchasing cooperative contract will be utilized for this purchase.

### ADMINISTRATIVE RECOMMENDATION:

Administration recommends the Renewal of the Shore Tel Support for Telephony System with Plan B Networks in the amount of \$11,442.37 utilizing the DIR-SDD-1603 purchasing cooperative contract as presented.

*The Canutillo Independent School District does not discriminate on the basis of race, color, national origin, gender, age or disability in its employment practices, or in providing education services, activities and programs, including technical education programs. For more information regarding the Canutillo Independent School District's policy of non-discrimination contact: Executive Director for Human Resources, (915) 877-7423, 7965 Artcraft Rd., El Paso, TX 79932.*

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# Request for Board Agenda Item

## Purchasing Department

Date: 10/25/13

Campus/Department: School Resources Division-Technology Services

Vendor Name: Plan B Networks, Inc.

Total Cost: \$11,442.37 ✓

### Item Description and Justification for Purchase:

Renewal of ShoreTel Support for Telephony System.

Reference RFP 13-03, Basic Maintenance. Board Approved on December 3, 2012.

Participating Schools/Departments: District-Wide

Funding Source: 199.51.6299.26.999.99 ✓ 100%  
(Account number to charge)

[Signature]  
Campus/Department Administrator

10/25/2013  
Date Signed

\*\*\*\* (Form must be received by the Purchasing Department by the last Wednesday of the month) \*\*\*\*

(To be completed by the Financial Services Division)

Purchasing Method: DIR-SDD-1603 PURCHASING COOPERATIVE

[Signature]  
Purchasing Agent

11/5/13  
Date Signed

[Signature]  
Executive Director of Financial Services

11/6/13  
Date Signed



# Purchasing Approval Sheet

## For Presentation to Board of Trustees

Purchasing Department

### Financial Services (Verification of Funding Availability and Account Coding)

☒ Approved

☐ Denied

Comment: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

11/6/13

### Federal Programs (For Compliance with Grant Requirements)

☒ Not Required

☐ Approved

☐ Denied

Comment: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### Curriculum & Instruction (For all Curriculum Related Purchases)

☒ Not Required

☐ Approved

☐ Denied

Comment: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### Technology (For all Computer/Software/Peripheral Purchases)

☒ Not Required

☐ Approved

☐ Denied

Comment: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### Legal Review

☒ Not Required

☐ Approved

☐ Denied

Comment: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### Purchasing

☒ Approved

☐ Denied

Comment: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

11/6/13





**Plan B Networks, Inc**  
1120 Industrial Park Road  
Suite 101  
Espanola, New Mexico 87532  
United States  
<http://www.planbnet.com>

## Quotation

**Date**

Oct 22, 2013 1:23 PM MDT

**Doc #**

11630 - rev 1 of 1

**Description**

ShoreTel Support Renewal  
Part.Term-12/1/13-6-30-14

**SalesRep**

Mares, Juan  
(P) 915-774-0207  
(F) 915-599-0232

**Customer Contact**

Flores, Tony  
(P) 915-877-7474  
[tony.flores@canutillo-isd.org](mailto:tony.flores@canutillo-isd.org)

**Customer**

Canutillo Independent School District (CI0097) / Juan Mares  
7965 Artcraft Road  
El Paso, Texas 79932  
(P) 915-877-7400

**Bill To**

Canutillo Independent School District  
Flores, Tony  
7965 Artcraft Road  
El Paso, Texas 79932  
(P) 915-877-7474

**Ship To**

Canutillo Independent School District  
Flores, Tony  
7965 Artcraft Road  
El Paso, Texas 79932  
(P) 915-877-7474

<b>Customer PO:</b> None	<b>Terms:</b> Undefined	<b>Ship Via:</b> UPS Ground
<b>Special Instructions:</b> None	<b>Carrier Account #:</b> None	

Item Description	Part #	Qty	Tax	Unit Price	Total
1 ShoreTel Support Renewal Partial Term - 12-1-13 thru 6-30-14 Includes SG Appliance Replacement (no phones), TAC Access, Software Upgrades		1	No	\$11,442.37	\$11,442.37

Subtotal: \$11,442.37  
Tax (0.000%): \$0.00  
Shipping: \$0.00  
**Total: \$11,442.37**

NOTE: PRICES ARE GOOD FOR 30 DAYS

Thank you for allowing us to send you a quotation. If you have any questions or have any special needs please contact us.

Plan B GSA#: GS-35F-0057U  
Plan B CAGE/NCAGE#: 38LV8  
Plan B DUNS#: 19-285-6248  
Plan B NM Contractors License#: 92595  
Plan B New Mexico CRS#: 03-031563-00-8  
Plan B Federal Tax ID #: 20-2117772  
Plan B Service Provider Identification Number or SPIN#: 143029136  
Plan B Texas Security Contractor# B16043

This document and the information herein is both CONFIDENTIAL AND PROPRIETARY. Plan B owns such information. Any unauthorized use of such information is strictly prohibited.

## SPECIFICATIONS

# ShoreCare Partner Support

### Overview

Partner Support provides ShoreTel Partners with backup services in three critical areas: telephone technical support, hardware replacement, and software upgrades. Partners purchase a separate Partner Support Agreement for each customer that is covered. Partners that choose Partner Support typically add additional services, like training, to create a postimplementation package that they brand, market and sell to their customers.

#### BENEFITS

- Telephone technical assistance 7 x 24 for the partner to ask questions regarding customer situations that the partner is troubleshooting
- Advanced exchange, next-business-day delivery for ShoreGear® switches
- Advanced exchange, ground delivery for covered ShorePhone™ IP telephones
- Software documentation, patches, updates and upgrades

### Partner Support versus the Enterprise Service Program

ShoreTel strongly recommends that a postimplementation service agreement be part of the complete solution that is offered to customers and is discussed early in the sales process. Based on the partner's business model they can either purchase Partner Support and be responsible for service delivery to the customer, or they can resell ShoreTel's Enterprise Service Program to the customer in which case the customer calls ShoreTel when they need assistance and ShoreTel delivers the service. In either case the partner purchases an annual contract that is tied to a named account.

Both Partner Support and the Enterprise Service Program include telephone technical support, advanced hardware replacement and software upgrades. In addition to these services the Enterprise Service Program also includes access to the ShoreCare web portal as well as web-based instructor-led administrator and end user training.

### Telephone technical support

Partners that purchase partner Support own the customer relationship. The partner takes the customer calls and troubleshoots the problem. If the partner needs to escalate, ShoreTel technical support engineers are ready to answer questions 24 hours a day, seven days a week via a toll-free phone number so that the partner can quickly respond to the customer. Non-urgent questions can be submitted on-line and are responded to within 24 hours.

### Hardware replacement

Advanced hardware replacement is vital to minimizing the customer's business-crippling downtime. In the unlikely event the partner's customer experiences a hardware failure, the partner's on-line request for a ShoreGear switch is immediately logged and shipped for next-business-day delivery to the address the partner designates. ShorePhone telephone replacements that are covered under contract receive the same advanced shipment attention but are sent via ground delivery.

### Software upgrades

Software updates and upgrades keep customers on the leading edge of technology. When new software is released, the detailed notes explaining the new features help the partner decide the best time to upgrade the customer. Software files and documentation can be downloaded, at the partner's convenience, from the ShoreTel web site and distributed to customers under the terms of the current Partner Support Agreement. ShoreTel's technical support team is available to answer any partner questions that may arise regarding upgrades.



## Partner Support requirements

Partner Support requires the partner to be the face to the customer, accepting full responsibility for the support relationship. Partners that purchase

Partner Support must be able to take the first call for technical assistance, manage the troubleshooting and respond to all requests for hardware replacement and software updates.

## Service programs comparison chart

ShoreCare Service Feature	Enterprise Service Program All services are delivered to the customer by ShoreTel	Partner Support All services are delivered to the customer by the partner. A Partner Support contract must be purchased for each customer that is supported by the partner	Product Warranty Services covered under warranty are delivered to the customer by ShoreTel
Telephone Technical Support	Customer access to ShoreTel's Technical Assistance Center 7 x 24 via a toll-free phone number. Calls are handled live from ShoreTel's Technical Assistance Center in California from 11 PM Sunday Pacific Time until 11 PM Friday, Pacific Time. Calls placed between 11 PM Pacific on Fridays and 11 PM Pacific on Sundays are returned within one hour.	Technical support access is exclusively for the partner. Response times are the same as the Enterprise Service Program.	Warranty does not include telephone technical support.
Hardware Replacement	Hardware replacements are shipped upon request for next-business-day delivery. Telephones that are covered under contract are shipped upon request via ground delivery.	Hardware replacement time frames are the same as the Enterprise Service Program. The Partner designates the destination (partner or end user) on a case-by-case basis.	Product must be returned to factory for repair/replacement with reasonable efforts return delivery.
Software	Published patches, fixes, updates, upgrades and documentation are available for download from the ShoreTel web site.	The Partner has access to published software and documentation that is then provided to the customer based on the terms of the current Partner Support Agreement.	Software is warranted to perform as sold. ShoreTel will provide a patch in the event a bug is discovered in the version purchased.
Training	Eight seats in ShoreTel's web-based, instructor-led the System Administrator course. Sixteen seats in ShoreTel's web-based, instructor-led the end user training course.	Partner training is covered in the ShoreTel Reseller Agreement. No additional training for the partner or end user is included as part of Partner Support.	No training is included in the product warranty.
Web Services	Customers are provided password access to the ShoreCare Web portal and locked documents. Customers can submit and manage hardware replacement and technical support cases online.	The partner is provided access to the ShoreCare Web portal and locked documents. Partners can submit and manage hardware replacement and technical support cases online.	Only the public areas of the ShoreTel web site can be accessed.

## Guidelines based on the partner's business model

Partner's Preferred Business Model	Partner Owns the Service Relationship	ShoreTel Owns the Service Relationship
Criteria	<ul style="list-style-type: none"> <li>• Delivery of support is a sustainable business model</li> <li>• There is sufficient sales volume to justify investment in an extensive dedicated support infrastructure</li> <li>• Partner is financially able to address resource intensive support issues that may arise</li> </ul>	<ul style="list-style-type: none"> <li>• Partner does not have the sales volume or the desire to be in the post-sales service delivery business</li> <li>• Investment in support infrastructure does not make good business sense for the partner</li> <li>• Partner prefers not to assume the risk of unplanned post-implementation support expenses</li> </ul>
Process	The partner purchases <b>Partner Support Service</b> from ShoreTel and sells partner branded services. The customer calls the partner for support.	The partner sells the ShoreTel <b>Enterprise Support Program</b> to the customer. The customer calls ShoreTel for support services.
Benefits	<ul style="list-style-type: none"> <li>• Partner manages their own service margins</li> <li>• Partner has a direct service relationship with the customer</li> <li>• Partner has 24x7 phone access to ShoreTel technical support when they need to escalate</li> </ul>	<ul style="list-style-type: none"> <li>• Partner earns good margins on the initial sale and renewals of the Enterprise Support Program</li> <li>• Partner continues to proactively manage the customer relationship after the sale</li> <li>• Customers receive expert support without partner investment in support infrastructure</li> </ul>

## ABOUT SHORETEL

ShoreTel is the provider of brilliantly simple Unified Communication (UC) solutions based on its award-winning IP business phone system. We offer organizations of all sizes integrated, voice, video, data, and mobile communications on an open, distributed IP architecture that helps significantly reduce the complexity and costs typically associated with other solutions. The feature-rich ShoreTel UC system offers the lowest total cost of ownership (TCO) and the highest customer satisfaction in the industry, in part because it is easy to deploy, manage, scale and use. Increasingly, companies around the world are finding a competitive edge by replacing business-as-usual with new thinking, and choosing ShoreTel to handle their integrated business communication. ShoreTel is based in Sunnyvale, California, and has regional offices and partners worldwide. For more information, visit [shoretel.com](http://shoretel.com).

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