# E-rate Form 470 for Category One Funding Year 2025

Lauren Abner Kentucky Department for Libraries & Archives 12.11.2024

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## DISCLAIMERS



 This presentation represents my unofficial interpretation of the Federal Communication Commission's E-rate rules and regulations.
 Official guidance can come only from the FCC and the Universal Service Administrative Company (USAC), the nonprofit that handles daily administration of E-rate and other Universal Service programs.

 USAC may update the application portal or the procedures after today's presentation.
 What I present is correct to the best of my knowledge at the time of the presentation.

## **FUNDING YEARS** & IMPORTANT DATES

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## **E-RATE FUNDING YEARS**

#### https://kdla.ky.gov/Library-Support/Library-Programs/Erate/Pages/Funding-Years.aspx

**Recurring Services** Application Process Non-Recurring Services **KY Library** Form 470 -Form 471 -Form 486 -Service Dates Invoicing Service Dates Invoicing Support: Competitive Application Service Start Date for Category Deadline for Category Deadline Bidding + CIPA Certification One or Two (SPI/BEAR) **Two Purchase** (SPI/BEAR) Lauren.Abner@ to Request & Installation ky.gov or Discounts (502) 564-1728 1 120 days from: July 1, 2024 Closed Closed April 1, 2024 Funding Year October 28, January 28, FCDL or competitive application filing to to 2025 2026 2024 Service Start Date bidding deadline window Sept. 30, 2025 June 30, 2025 (whichever is later) July 1, 2024 to Mid-January to 120 days from: July 1, 2025 April 1, 2025 Funding Year Late Feb 2025 Late March 2025 FCDL or October 28. January 28. to to application filing 2025 competitive Service Start Date 2026 2027 Sept. 30, 2026 June 30, 2026 bidding deadline window (whichever is later) July 1, 2025 to Mid-January to 120 days from: July 1, 2026 April 1, 2026 **Funding Year** Late Feb 2026 Late March 2026 FCDL or October 28, January 28, to to competitive application filing 2027 2028 Service Start Date 2026 Sept. 30, 2027 June 30, 2027 bidding deadline window (whichever is later) All applicants file Most applicants All applicants Both Category the Form 486 to Non-recurring open at least one May request May request must file the Form release funding for One and Two = one-time 28 calendar day one 120-dav one 120-dav Notes 471 every year to services may be purchases such invoicing. competitive extension by extension by recurring (ex: receive a funding FCDL = Funding as networking the deadline bidding process the deadline commitment. monthly internet) Commitment equipment each year. Decision Letter

**E-rate Funding Years Chart** 

# **TIMELINE FOR FY 2025**

### Competitive Bidding for FY 2025 services

- Opened September 19, 2024 (Form 470 released)
- Last date to open competitive bidding: February 28, 2025 (projected – date not finalized)

### When Services Will Happen for FY 2025

- Recurring Services: July 1, 2025, to June 30, 2026
  - Includes: Category One monthly internet access or transport services; Category Two basic maintenance of eligible equipment)
- Non-recurring Services: April 1, 2025 to September 30, 2026
  - One-time Category Two purchase/installation

## TIME TO UPDATE PROFILES

The 'administrative window' to update entity profiles will remain open until shortly before the start of the Form 471 filing window.

#### • Has a branch's address, phone #, or square footage changed?

- Update information in the <u>E-rate Productivity Center</u>
- If the square footage will change before September 30, 2026, due to construction, make sure you have documentation to verify the new square footage before filing the Form 471 for Category Two.

#### Are you opening or closing branches during FY 2025?

- Obtain entity numbers for new branches
- Consider permanently canceling entity numbers for closed branches once all E-rate invoicing for that branch has been completed.



## E-RATE ELIGIBLE SERVICES LIST

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# THE ELIGIBLE SERVICES LIST

- •The full E-rate Eligible Services List can be downloaded from the USAC website: <u>https://www.usac.org/e-rate/applicant-process/before-youbegin/eligible-services-list/</u>
- •Eligible services are separated into two broad categories:
  - Category One: Connectivity to the Building
  - Category Two: Connectivity to the Device

## **Category One**

#### **Data Transmission Services & Internet Access**

- Monthly Internet service for branch buildings, including installation lines/circuits can be fiber or non-fiber (cable, DSL, satellite, etc.)
  - Fees for static IP addresses are eligible as part of your library's internet access
  - Fees for "basic termination equipment, such as a cable modem, CSU/DSU, network interface device, or copperto-fiber converter" may be eligible as part of your library's internet access.
- Leased data lines (T1, lit fiber, dark fiber, etc.)
- Cellular data (hotspot service) for bookmobile
- Hotspot service & devices for off-premises use (patron lending) - subject to cap
- Self-provisioned broadband networks (owned/operated by applicant)
- Network Equipment required to make data transmission and/or internet access functional (ex: modulating electronics)

Recurring service dates for FY 2025: July 1, 2025, to June 30, 2026

## **Category Two**

Internal Connections (IC)

- **Cabling/Data Wiring** (bulk cable, drops, patch cables, cabling installation/removal)
- Switches (hardware, licenses, transceivers, other modules)
- Routers<sup>†</sup> (hardware<sup>\*\*</sup>, licenses<sup>\*\*</sup>, transceivers, other modules)
- Wireless Access points (hardware, licenses)
- Wireless controller systems
- Firewalls (hardware, licenses\*\*)
- UPS (Uninterruptible Power Supply/battery backup)\*\*
- Racks\*\*
- Caching services or equipment
- Antennas, connectors, & related components
- Software supporting components on the list used to distribute broadband through the library

FY 2025 Early Installation: April 1, 2025 FY 2025 Late Installation: September 30, 2026

\*\*Some restrictions apply depending on usage, ineligible security components, etc. † For a router leased from the internet service provider, your library may need to bid for Category Two Internal Connections for Function: Router. See 'Q9 of FAQs: Eligible Fiber

Services

## Category Two

### **Basic Maintenance of Internal Connections (BMIC)**

- Repair and upkeep of eligible hardware (even if not purchased through E-rate)
- Wire and cable maintenance
- Configuration changes
- Basic technical support including online and telephone based technical support
- Software upgrades and patches including bug fixes and security patches

#### **Managed Internal Broadband Services (MIBS)**

• 3rd party operation, management, and monitoring of eligible broadband internal connections (ex: managed Wi-Fi, managed firewall)

Funds for Learning has a good explanation of <u>Basic</u> <u>Maintenance of</u> <u>Internal Connections</u> (<u>BMIC).</u>

### Miscellaneous (Cat 1 or 2)

#### Some taxes, surcharges, and other similar, reasonable charges

- Federal Access Recovery Charge on internet invoices permissible charge for use of a local carrier's network; not all ISPs charge this
- USF fees on internet invoices "customer charges for universal service fees, but do not include additional charges for universal service administration"
- Kentucky taxes including property taxes, Kentucky Lifeline Support Fund Fee

#### **Rental or lease fees for eligible components**

Shipping

Training – only for new equipment purchased with Cat2 funds

#### Installation and configuration

• May be performed by a 3<sup>rd</sup> party rather than the vendor who sold the equipment

# **DUPLICATIVE SERVICES**

Caution – E-rate does <u>**not**</u> provide discounts for services that are considered duplicative. Example: internet access that is used as backup, redundancy, failover, etc.

If the connections serve different populations (internet for public, internet for staff), they may both be considered E-rate eligible.

§22 of the Second Report and Order and Further Notice of Proposed Rulemaking for the E-rate program addresses duplicative services:

"Funding of Duplicative Services In the Universal Service Order, the Commission indicated that an applicant's request for discounts should be based on the reasonable needs and resources of the applicant, and bids for services should be evaluated based on cost-effectiveness. Pursuant to this requirement, the Administrator has denied discounts for duplicative services. Duplicative services are services that deliver the same functionality to the same population in the same location during the same period of time. We emphasize that requests for discounts for duplicative services will be rejected on the basis that such applications cannot demonstrate, as required by our rules, that that they are reasonable or cost effective." [emphasis mine]

# **CIPA COMPLIANCE**



Children's Internet Protection Act (CIPA) compliance:

- Necessary if requesting E-rate discounts for Internet Access or any Category Two products & services
  - Exception: CIPA compliance not required when requesting Telecommunications services only (ex: transport only for WAN circuit between library branches)
- 3 elements of compliance:
  - Technology Protection Measure (filter)
  - Internet Safety Policy
  - Public Meeting prior to adopting Internet Safety Policy
- View archived training from KDLA check E-rate section: https://kdla.ky.gov/Library-Support/Library-Staff-Development/Pages/Archived-Webinars.aspx

### COMPETITIVE BIDDING OVERVIEW

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# **COMPETITIVE BIDDING**



On the Form 470, applicants describe the E-rate eligible services needed in the next funding year. Potential service providers have *at least* 28 calendar days to respond with bids.

- No decision about which service provider to use can be made before 28 calendar days has elapsed.
- You can wait longer if you want; you must wait longer if you state a later due date in the Form 470 narrative or RFP.

Filing a Form 470 does <u>not</u> obligate an applicant to sign contracts or accept E-rate funding.

## **OPEN & FAIR PROCESS**

- Open and fair competitive bidding is a core principle of the E-rate program
- From the USAC website:
  - "Open" means there are no secrets in the process such as information shared with one bidder but not with others – and that all bidders know what is required of them.
  - "Fair" means that all bidders are treated the same and that no bidder has advance knowledge of the project information.
  - Never share pricing information or tell vendors who else is bidding.

# THE PRI¢E I\$ RIGHT

E-rate applicants are required to select the most cost-effective solution for services.

- E-rate eligible cost must be assigned the highest point value in the bid evaluation.
  - E-rate ineligible costs can be considered in the bid evaluation, but at a lower point value than eligible costs.
- The least-expensive solution doesn't always win the bid evaluation; it may not score well on factors other than cost.

## FROM SERVICE REQUESTS TO FUNDING REQUESTS

- Having both the correct service requests and 470 narrative language will be important during application review.
- The Form 470 service requests must encompass the details of the services your library will list on the Form 471 application. For example, your library can't request discounts on a bandwidth that is higher than the maximum bandwidth capacity on the Form 470.
  - See next slide for examples

## **COVERING YOUR REAR FOR THE FORM 471**

Funding Requests on the Form 471 application for discounts

- If my library will make *funding* requests for discounts on:
  - Fiber, cable, DSL, or satellite internet access
  - Data transmission only (WAN circuits)
  - Bookmobile hotspot service
  - Hotspot lending service & devices
- If a library branch or the bookmobile will be a recipient of service on the application

Service Requests on the Form 470 for competitive bidding

- Then the Form 470 must include *service* requests for:
  - Internet Access and Data Transmission Service
  - Standalone Data Transmission Service
  - Cellular Data Plan/Air Card Service
  - Wireless Internet services that can be
     delivered with a Wi-Fi hotspot for off-premises use + Wi-Fi hotspots for off-premises use
- Then the branch and address
   must be included in the competitive bidding information

## BUSINESS-CLASS INTERNET BIDDING EXEMPTION

A Form 470 for internet access is <u>not</u> necessary if ALL these conditions are met:

- Bandwidth is at least 100 Mbps download and 10 Mbps upload
- Provides basic conduit access to the Internet at those required minimum speeds
- Pre-discount cost is less than \$3600 annually (\$300/month) for each eligible entity, including any installation or other eligible fees
- Service and price are commercially available to nonresidential customers



# CONTRACTS

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# **CONTRACT EXPIRING?**

Are any of your contracts for E-rate eligible recurring services such as internet or cellular data for the bookmobile set to expire before June 30, 2026?

- If Yes, you must bid again for these services on a Funding Year 2025 Form 470
- Recurring services purchased month-to-month or by tariff agreements must be bid <u>every</u> year.
- You should also bid again if your library is still under contract but needs to sign new paperwork to make upgrades with your provider.
- •WHEN IN DOUBT, BID AGAIN.

## YOUR LIBRARY'S PROCUREMENT PROCEDURES

Does your library board need to review contracts before they are signed?

- If so, keep in mind the board meeting dates in late 2024 and early 2025.
- •Once the Form 471 filing deadline is set...
  - Look up the date for the last board meeting that will occur before the Form 471 deadline (projected March 28, 2025)
    - Plan to file all Forms 470 for competitive bidding at least 5 weeks prior to this board meeting. (Sooner is better!)

## ALREADY UNDER CONTRACT?

Q: My library wants to receive E-rate support for the next funding year, but we have an ongoing contract that wasn't approved for E-rate discounts in a previous funding year. Is it possible to get E-rate for that service?

- A: Yes, but there are some provisos:
- The existing contract must honestly win the bid evaluation.
- You must memorialize the contract with a new E-rate "Contract Award Date"—you'll sign and date the contract again to show that it won the bid evaluation at some date after the 28 calendar day competitive bidding period.
- THIS IS NOT THE IDEAL WAY TO DO E-RATE The best practice is to file a Form 470, wait at least 28 calendar days, evaluate bids, and <u>then</u> sign a new contract. Any deviation from this best practice complicates how you enter data on forms.

## **MODEL PROCUREMENT**

- Most Kentucky libraries follow the Kentucky Model Procurement Code
  - The library board must adopt the MPC as its official way to purchase, and this step was likely taken many years ago (the MPC is 40+ years old).
  - Spelled out in Kentucky Revised Statutes 45A.345–.460
  - Must receive competitive sealed bids for contracts and purchases over \$40,000. A notice must be given in a newspaper <u>or</u> through an internet post at least 7 days before the date set for the opening of bids. The bids must be opened publicly in an announced location and the contract awarded to either the lowest bidder or the bidder submitting the <u>lowest</u> <u>evaluated bid price</u>. (See <u>KRS 45A.365</u>)

# KRS 424.260(1)

- If your library doesn't follow the Model Procurement Code, then purchases over \$40,000 must be bid per <u>KRS 424.260(1)</u>
  - Must also advertise the bid per <u>KRS 424.130</u>
  - You need only advertise once but may advertise two or more times provided that at least one advertisement is carried between 7 and 21 days before the close of bidding. The advertisement must include a description of what is to be bid, the time and place for receipt of bids, and any special terms of the sale.

## FORM 470 BOILERPLATE

- The Form 470 contains a field for state and local procurement information. Here's some boilerplate for you to use:
  - For MPC libraries: XX County Public Library has adopted the Kentucky Model Procurement Code (Kentucky Revised Statutes 45A.345-.460).
  - For non-MPC libraries: Kentucky Revised Statute 424.260(1) requires sealed bids for purchases over \$40,000.

### E-RATE PRODUCTIVITY CENTER: UPDATING LIBRARY PROFILES

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## **E-RATE PRODUCTIVITY CENTER**

- To set up an account or if you have login issues: call the USAC Client Service Bureau at 1-888-203-8100
  - Must select a staff member to act as account administrator. Once the administrator is set up in EPC, they can add more users for your library.
- Two ways to get to EPC portal:
  - Go to <a href="https://forms.universalservice.org/portal/login">https://forms.universalservice.org/portal/login</a>
  - Go to main E-rate website (<u>https://www.usac.org/e-rate/</u>) and click on blue Sign In button near the top of the page.

Administrative Co.					
Username					
lauren.abr	ner@ky.gov				
Password					
	,				
Forgot passw	ord?				
(USAC) systems Service program is provided sole purposes. By lo of this system in the USAC system with applicable searched, copie	ng a portal to Universal Service Administrative Company sused to administer participation in the federal Universal ms in compliance with 47 C.F.R. Part 54. Access to the systems by to USAC-authorized users for USAC-authorized business gging in, you represent that you are an authorized user. Use ndicates acceptance of the terms and conditions governing ms. USAC monitors user access and content for compliance et aws and policies. Use of the system may be recorded, read, ed and/or captured and is also subject to audit. Unauthorized fithis system is strictly prohibited and subject to disciplinary ion.				

Click the box to accept
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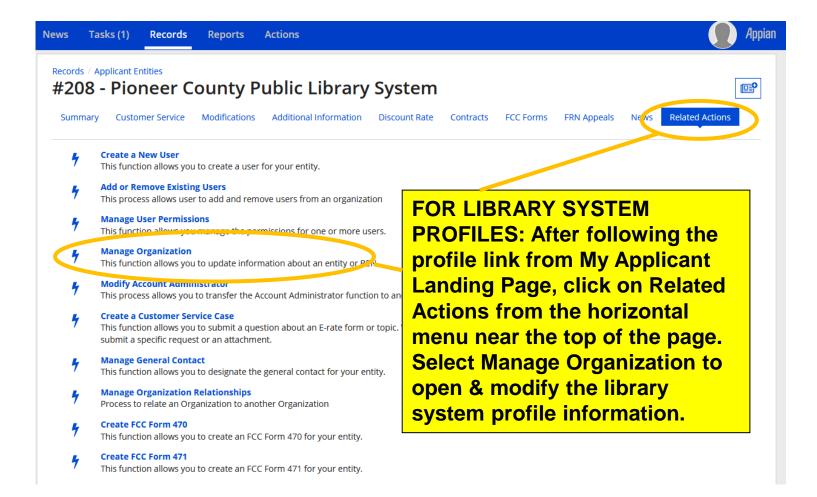
By signing in, I accept the terms and conditions of the USAC system.

Sign In

## **UPDATING PROFILES**

lews	Tasks (1)	Records	Reports	Actions					Appian	
My Applicant Landing Page										
Training Universal Service Administrative Co.				Funding Request Report   FCC Form 470   FCC Form 471   FCC Form 486   Appeal   FCC Form 500   SPIN Change   Service Substitution   Hurricane Impact Designation   Manage Users   Manage Organizations   USAC Website   Contact Us   Help						
Welcom	ne, Pioneer Cour	nty Public Lib	rary System!							
Notifications										
Notification Type Please select a value			✓ Status ② ● All							
<b>Funding Year</b> Select a Funding Year			To update the address,		<mark>ldress, ph</mark>	one,				
	Notification Description		Issu	Issued Date		square footage, or other information about your system or its branches, go to My				
				No items available						able
My E	intities					Ap	olicant	Landir	ng Page a	
Entity				<b>Click on the library system</b> branch name under My Er						
Pioneer County Public Library System				208	bra	ncn na	me un	aer wy En	itities.	
Loganville Branch Library				209		Loganville	KY	41800		
Pioneer County Public Library Main Branch				210		Boonesburg	KY	41700		
Pioneer County Bookmobile				211		Boonesburg	KY	41700		

### **UPDATING LIBRARY SYSTEM PROFILE**



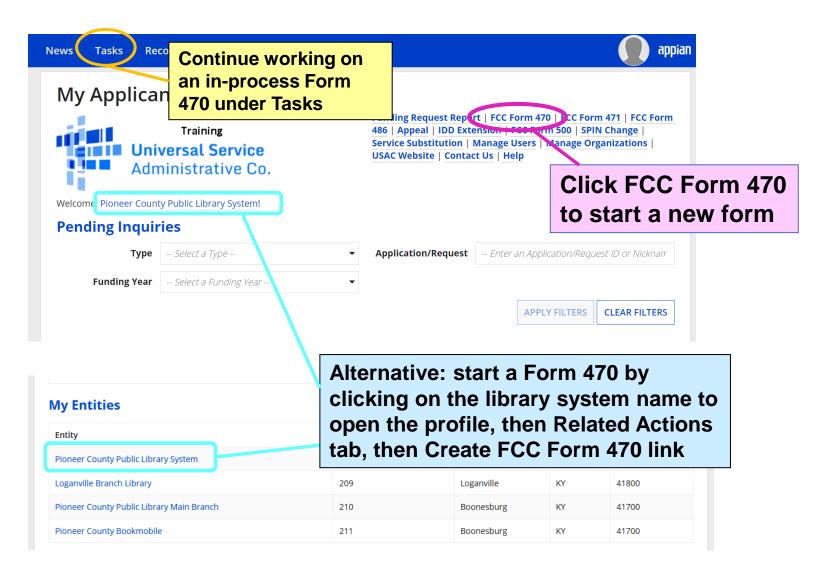
## **UPDATING BRANCH PROFILES**

News Tasks (1)	Records Reports Actio	ons	Appian					
Records / Applicant Entities #210 - Pioneer County Public Library Main Branch  MANAGE ORGANIZATION MARAGE ANNEXES Summary Modifications Additional Information Category Two Budget Contracts FCC Forms News Related Actions								
Organization	Details							
Name	Pioneer County Public Library Mai	FOR INDIVIDUAL B	RANCH PROFILES: After					
Entity Number	210	following the link f	rom My Applicant Landing					
FCC Registration Number		Page, click on the Manage Organization						
Contact Infor	mation	button to modify the entity's profile.						
Physical Address	100 Main Street Boonesburg, KY 41700	Alternative: click on Related Actions in the						
Mailing Address	Mailing Address 100 Main Street Boonesburg, KY 41700 horizontal menu, then click on Manag							
~Applicant At	tributes	Organization.						
Latitude	Not Found	User-Entered						
Longitude	Not Found	Latitude						
Urban/Rural Status	Not Found	User-Entered Longitude						
Library Sub-Type	Public Library	User-Entered	Rural					
	Private Library	Urban/Rural Status						
	Academic	Is this library part of	Yes					
	Research	a library system? Square Footage	16000					

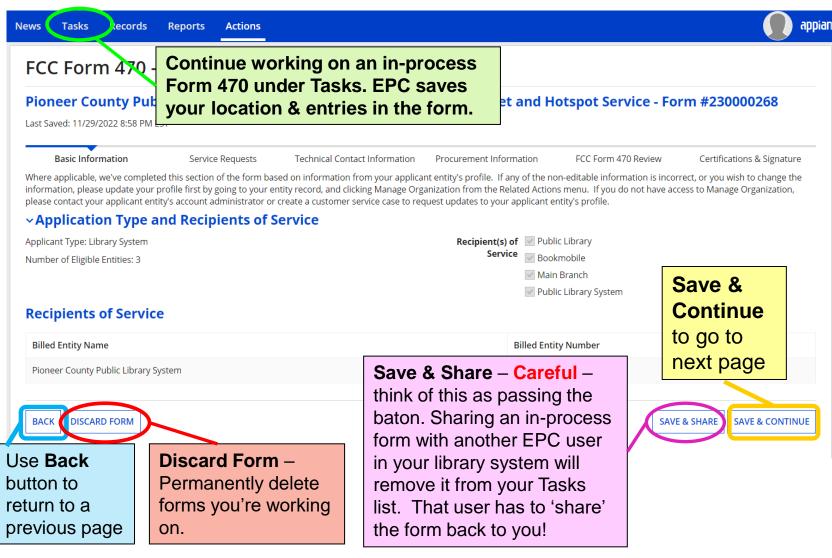
## FORM 470 – BASIC INFORMATION

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### **START OR CONTINUE A FORM 470**



## FORM 470 – NAVIGATION



## FORM 470 – BASIC INFORMATION (1/3)

### FCC Form 470 - Funding Year 2025

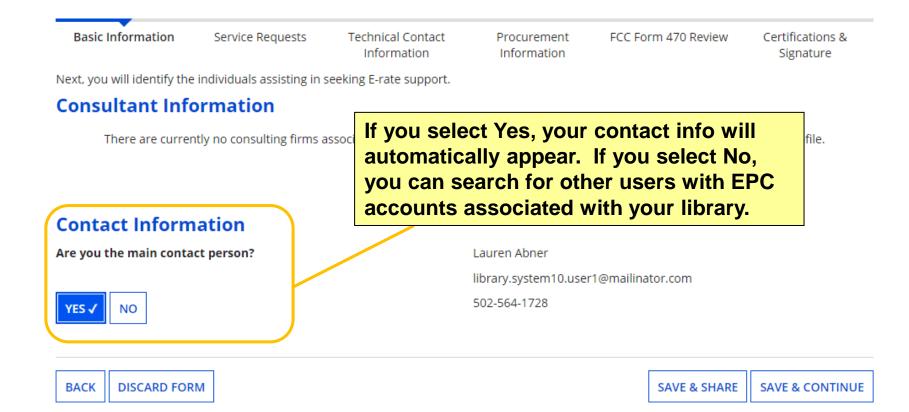
Basic Information	Service Requests	Technical Contact Information	Procurement Info	rmation	FCC Form 470 Review	Certifications & Signature
> FCC Notice Require	ed By The Paperw	ork Reduction Act (ON	IB Control N	umber:	3060-0806)	
✓Billed Entity Inform	nation					
Pioneer County Public Library Sys	tem		Billed Entity Numbe	r: 208		
100 Main Street			FCC Registration Nu	mber: 00184	29621	
Boonesburg, KY 41700				Ve		votomic Dillod
111-222-3333				TO	our library sy	ystem's Billed
library.system10.user1@mailinato	pr.com			En	tity Informa	tion will be
Application Nicknan	ne				•	s EPC profile.
Please enter an application nick	kname here. *			pu		s LFC prome.
FY 2025-26 Monthly Internet, Bo	okmobile Hotspot, & Hotspot	Lending				
DISCARD FORM					SAVE	& SHAP
Enter a nickr	name that y	vill be easy to	find			
		•			Save & Conti	
on your Task		•			go to next page	ge
through you	r library's c	completed forr	ns.			
5 5	5	•				

## FORM 470 – BASIC INFORMATION (2/3)

### FCC Form 470 - Funding Year 2025

Pioneer County Public Library System - Form #250000205 Last Saved: 12/10/2024 8:03 PM EST Basic Information Service Requests Where applicable, we've completed this section of the form based	The Number of Eligible Entities should include your main library and other branches that have been assigned entity numbers (including bookmobiles and
change the information, please update your profile first by going to Manage Organization, please contact your applicant entity's account	nt adminis
~Application Type and Recipients of Ser	
Applicant Type: Library System	Recipient(s) of Public Library Service Recipient
Number of Eligible Entities: 3	BOOKHODIE
	V Main Branch
	Public Library System
Recipients of Service	
Billed Entity Name	Billed Entity Number
Pioneer County Public Library System	208
BACK Only the name and BEN fo	or the library system will be
-	dles billing for all the branches.

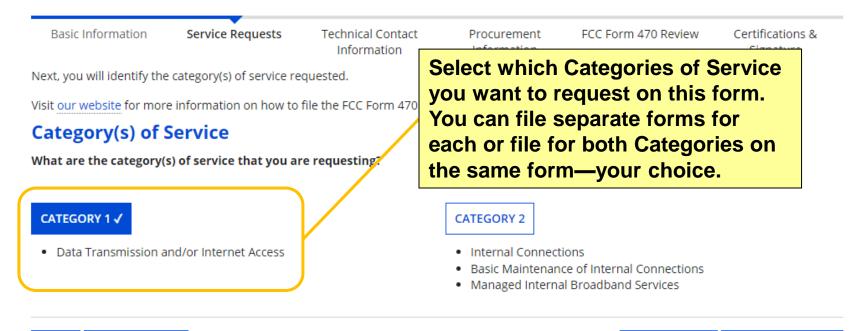
## FORM 470 – BASIC INFORMATION (3/3)



### FORM 470 – CATEGORY OF SERVICE + RFP DOCUMENTS

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# **CATEGORY(S) OF SERVICE**



BACK DISCARD FORM

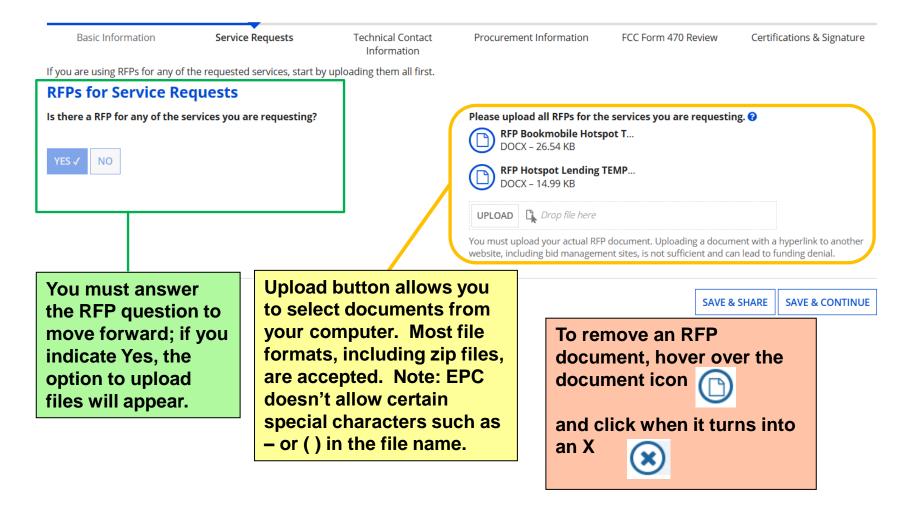
SAVE & SHARE SAVE & CONTINUE

# **NOTE ON RFP DOCS**

USAC uses the terms 'RFP' or 'request for proposal' for any documents that further describe an applicant's needs. RFPs can be useful when making extensive requests and are required for certain requests by E-rate program rules.

- Applicants must upload RFP documents:
  - If such documents have been issued as part of the procurement you must upload all RFP documents in EPC, not merely provide a link to where they are posted elsewhere.
  - \*\*To request cellular data for the bookmobile: USAC requires RFPs for cellular data that include a description of the service requested ('placeholder' RFPs aren't allowed). Templates for bookmobile data RFPs can be requested from the KDLA State E-rate Coordinator.
  - To make Category One service requests for other Functions including "Leased Dark Fiber and Leased Lit Fiber"; "Self-Provisioned Network and Services Provided Over Third-Party Networks"; "Maintenance & Operations"; and 'Other'.

# **UPLOADING RFPs (1/2)**



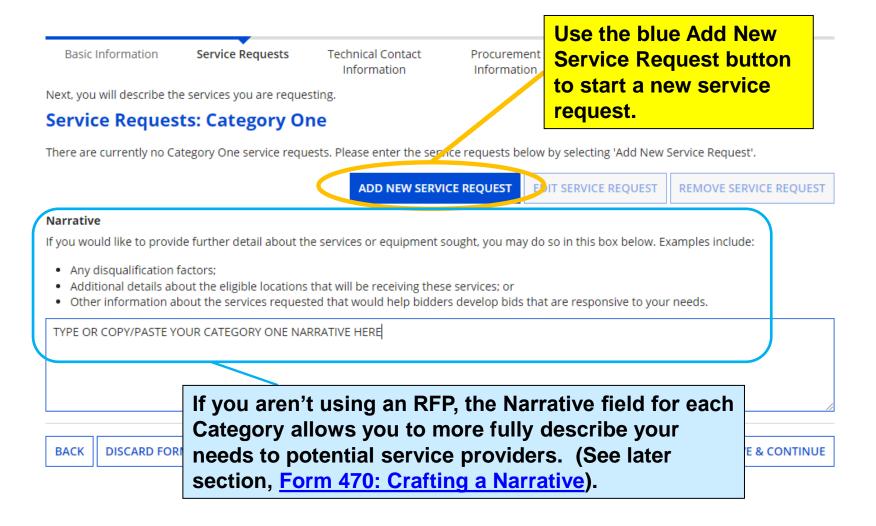
# **UPLOADING RFPs (2/2)**

Basic Information	Service Requests	Technical Contact Information	Procurement Information	FCC Form 470 Review	Certifications & Signature
Next, you will indicate whether	RFPs are applicable across a ca	ategory.			
RFPs for Service Re	quests				
If applicable, please select the RFP Bookmobile Hotspot TEI RFP Hotspot Lending TEMPL This selection will only apply to ne	MPLATE ATE		t affect service requests already adde	ed to this FCC Form 470.	
BACK DISCARD FORM				SAVE &	SHARE SAVE & CONTINUE
	to ALL se of Service Category	rvice request e. Most librar One request	attach the uplo ts in the selecte ries <u>won't</u> do th s, but it's comm o equipment u	ed Category his for non for	

### SERVICE REQUESTS – GENERAL NAVIGATION

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## **ADDING SERVICE REQUESTS**



### EDIT OR REMOVE SERVICE REQUESTS

### Service Requests: Category One

Please enter the service requests below by selecting 'Add New Service Request'.

	Service Type	Function	Function Other Description	Minimum Capacity	Maximum Capacity	Entities	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs			
	Data Transmission and/or Internet Access	Internet Access and Data Transmission Service		C	To edit or remove a service request, check the box in the far-left column. You can edit/remove only 1 service								
	Data Transmission and/or Internet Access	Standalone Data Transmission Service								e			
	Data Trapponission Ind/or Internet Access	Cellular Data Plan/Air Card Service		5 Mbps	1 Gbps	1	1	Lines	Yes	Bookmobile hotspot RFP template			
ADD NEW SERVICE REQUEST						EDIT SERVI	ICE REQU	EST REMOVE SE	RVICE REQUEST				

Select 'Edit Service Request' to re-open and make changes to a service request. Select 'Remove Service Request' to delete a service request entirely.

### **NARRATIVE & INSTALLMENT PLAN**

#### Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this b

- Any disgualification factors;
- Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are espoi

All bids must include the Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be dis not confirm availability at the service delivery address will be considered non-responsive and there is

OTY 1 FOR MONTHLY FIBER INTERNET AT 100 MAIN ST, BOONESBURG, KY 41700. The main library curre download speeds between 100 Mbps and 1 Gbps, fees for 5 static IP addresses, and estimated tax is and 2023. The library seeks only fiber bids. Bids for non-fiber internet will be disqualified.

OTY 1 FOR TRANSPORT CIRCUIT FROM 100 MAIN ST, BOONESBURG, KY 41700 TO 300 TULIP POPLAR LN, LOGANVILLE, KY 41800, Please quote all download speeds between 100 Mbps and 1 Gbps (fiber or non-fiber), fees for 5 static IP addresses, and estimated taxes and other surcharges. Service start date is July 1, 2023.

QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. F date is July 1, 2023.

### **Installment Payment Plan**

Are you seeking an installment payment plan for the non-discounted portion of any special construction charges associated with the request(s) listed above? \*

Yes

No

For Category One internet access, you must answer a question about installment payments for special construction charges. It's very rare for Kentucky libraries to request special construction, so most likely the answer is 'No'. For more on special construction, see USAC's Fiber – Summary Overview page.

Make sure the narrative

and/or RFP documents

cover all Category One

service requests. More

tips on the narrative

Narrative.

appear in the section, Form 470: Crafting a

### SERVICE REQUEST – MONTHLY INTERNET

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## ADD NEW SERVICE REQUEST





#### Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- · Additional details about the eligible locations that will be receiving these services; or
- · Other information about the services requested that would help bidders develop bids that are responsive to your needs.

TYPE OR COPY/PASTE YOUR CATEGORY ONE NARRATIVE HERE

BACK DISCARD FORM
SAVE & SHARE SAVE & CONTINUE

## **'I SEEK BIDS...' (1/3)**

To create a Category One service request, you must selection options from 3 sets of statements.



CANCEL

In the 1<sup>st</sup> set of statements, Category One service requests for all Kentucky public libraries should start with the 1<sup>st</sup> statement, "I seek bids for internet access and/or data transmission service".

## **'I SEEK BIDS...' (2/3)**

Basic Information

Service Requests

Please select the option below that matches the services for which

Visit our website for more information on how to file the FCC Form

### **Add New Service Request**

For the 2<sup>nd</sup> set of statements, almost all Kentucky libraries will select the 1<sup>st</sup> option: "I seek bids for internet access and transmission service..."

I seek bids for internet access and/or data transmission service.

I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, microwave or wireless).

🔿 I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required.

 $\bigcirc$  I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

I seek to build my own network.

I seek bids for wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use.

CANCEL

To edit the selection for a set of statements, click on the selected statement again to re-open the dropdown and see all the options.

## 'I SEEK BIDS...' (3/3)

Basic Information	Service Requests	Technical Contact Information	Procurement Information	FCC Form 470 Review	Certifications & Signatur
ease select the option below	that matches the services for w	hich you are seeking bids.			
it our website for more info	rmation on how to file the FCC F	Form 470.			
dd New Service R	equest				
l seek bids for inter	net access and/or data t	ransmission service.			
			ided over any combination ch as cable, DSL, copper, s		
independent services.		for mobile devices for comm	service provider(s) as a bundled p ercial wireless service for a school		
	-				
ANCEL In the 3 <sup>r</sup>	<sup>d</sup> set of staten	nents, select	the 1 <sup>st</sup> option,	, "I seek bids	s for
intornot	access and d	lata transmis	sion services,	whether offe	ered by
memer					_
	vice provider(	s) as a bund	led package or	r offered by c	one or

## **CATEGORY ONE FUNCTION**

Basic Information Service Requests Technical Contact Procurement FCC Form 470 Review Certifications & Information Information Signature

Please select the option below that matches the services for which you are seeking bids.

Visit our website for more information on how to file the FCC Form 470.

### Add New Service Request

I seek bid
 After selecting the last 'I seek bids...' statement, the correct
 Service Type (Data Transmission and/or Internet Access) and
 Function (Internet Access and Data Transmission Service) will appear below, along with additional fields to complete.

● I seek bid<del>s for internet access and data transmission services, whether onered by one service provider(s) as</del> a bundled package or offered by one or more service provider as independent services.

### Service Type

Data Transmission and/or Internet Access

### Function \*

Internet Access and Data Transmission Service

### **SERVICE REQUEST DETAILS (1/2)**

#### Service Type

Data Transmission and/or Internet Access

### Function \*

Internet Access and Data Transmission Service

#### Quantity \*

1

Unit

Each

### Minimum Capacity \*

100 Mbps

### Maximum Capacity \*

1 Gbps

CANCEL

Quantity refers to the number of lines or circuits requested. This example shows 1 circuit/line because the request covers service for the main building only; multiple service requests for the same Function can appear on the Form 470 if it simplifies the description of services for multiple branches.

### No

Minimum Capacity should reflect your library's current download speed. Maximum Capacity should reflect the highest speed your library is seeking. Be careful about units:

• **Mbps = megabits per second.** Use this for connections below gigabit.

### • Gbps = gigabits per second.

Recommended max for both fiber and non-fiber requests.

## **SERVICE REQUEST DETAILS (2/2)**

#### Service Type

Data Transmission and/or Internet Access

#### Function\*

Internet Access and Data Transmission Service

Number of entities served = number of	Number of entities served? *
branch buildings to receive the service	Are you also seeking Installation, Activation and Initial Configuration for this service?
Best practice: check Yes for the question about installation, activation	* • Yes • No
in case your library starts a new service with setup fees.	Please select the RFP(s) that apply to this service request.         RFP Bookmobile Hotspot TEMPLATE         RFP Hotspot Lending TEMPLATE
Check the box beside the RFP name only if this request is included in the document.	SAVE & CREATE ANOTHER REQUEST SAVE REQUEST
'Save & Create Another Request' will start a request with all the same 'I seek bid statem but those statements cannot be edited.	

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### NARRATIVE FOR INTERNET ACCESS REQUESTS

#### Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are responsive to your needs.

ALL BIDS MUST INCLUDE the Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Vendor must have the FY2024 Form 473/SPAC on file or the bid will be disqualified. Generic bids for internet access that do not confirm availability at the service delivery address and/or do not include specific special construction charges (if applicable) will be considered non-responsive and therefore disqualified.

QTY 1 FOR MONTHLY INTERNET AT 100 MAIN ST, BOONESBURG, KY 41700. Please quote download speeds between 100 Mbps and 1 Gbps, fees for 5 static IP addresses, and estimated taxes and other surcharges. Service start date is July 1, 2025.

QTY 1 TRANSPORT CIRCUIT BETWEEN 100 MAIN ST, BOONESBURG, KY 41700 AND 300 TULIP POPLAR LN, LOGANVILLE, KY 41800. Please quote download speeds between 100 Mbps and 1 Gbps and estimated taxes and other surcharges. Service start date is July 1, 2025.

QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. Service start date is July 1, 2025. Please see RFP document for details of this request.

QTY 10 LINE FOR OFF-PREMISES PATRON HOTSPOT LENDING including monthly service and devices. Service start date is July 1, 2025. Please see RFP document for details of this request.

Make sure the narrative and/or RFP documents cover all Category One service requests. More tips on the narrative appear in the section, Form 470: Crafting a Narrative.

### INSTALLATION PAYMENT PLAN

When requesting Internet Access or Data Transmission, the Installment Payment Plan question will appear below the narrative field. It's VERY, VERY RARE to request this option. The majority of Kentucky public libraries will answer No to this question. Then Save & Continue.

### Installment Payment Plan

Are you seeking an installment payment plan for the non-discounted portion of any special construction changes associated with the request(s) listed above? \* Yes

💿 No

BACK DISCARD FORM

SAVE & SHARE SAVE & CONTINUE

#### **Installment Payment Plan**

Are you seeking an installment payment plan for the non-discounted portion of any special construction charges associated with the request(s) listed above? •

Yes

⊖ No

Over how many years do you wish to amortize the costs?

1

4

Please select a range of years above.

Do you prefer annual or monthly payments? \* Annual Monthly

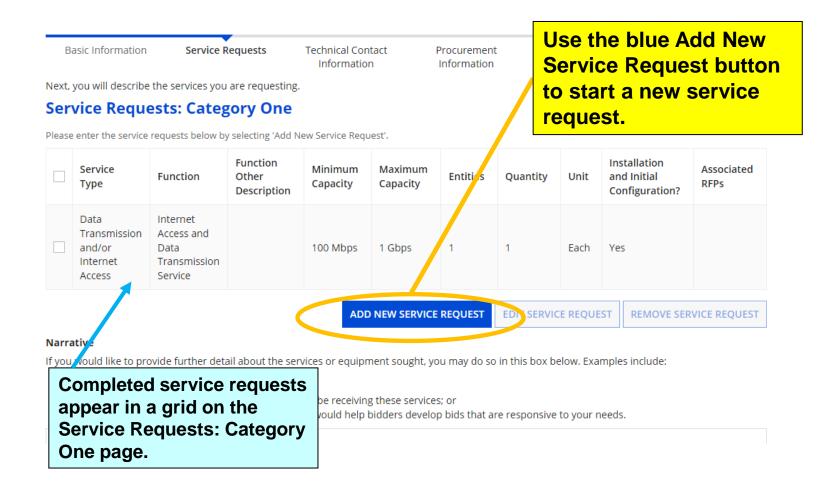
### In the VERY, VERY RARE

instance when a library answers Yes to this question, additional fields appear for options to amortize costs.

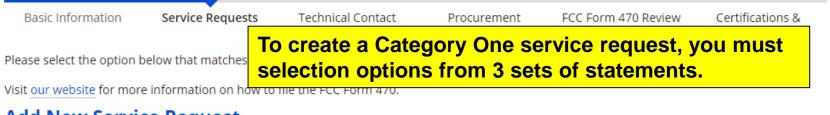
### SERVICE REQUEST – DATA TRANSMISSION ONLY (WAN CIRCUIT)

Return to Presentation Contents

## **ADD NEW SERVICE REQUEST**



## **'I SEEK BIDS...' (1/3)**



### Add New Service Request

I seek bids for internet access and/or data transmission service.

O I seek bids for Category One network equipment or maintenance and operations.

CANCEL

In the 1<sup>st</sup> set of statements, Category One service requests for all Kentucky public libraries should start with the 'I seek bids for internet access and/or data transmission service' statement.

## **'I SEEK BIDS...' (2/3)**

Basic Information

Service Requests

Please select the option below that matches the services for w

Visit our website for more information on how to file the FCC F

### Add New Service Request

In the 2<sup>nd</sup> set of statements, libraries requesting bids for Wide Area Network (WAN) circuits for data transmission only should select the 3<sup>rd</sup> statement: "I seek bids to purchase data transmission service only (i.e., that does not include internet access service)."

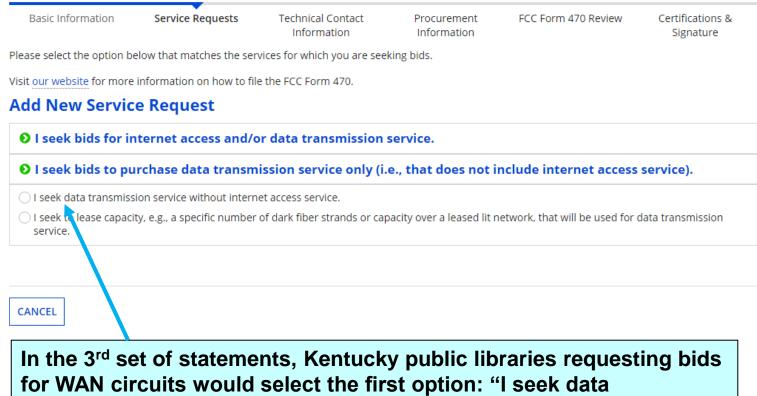
### I seek bids for internet access and/or data transmission service

- I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable. DSL, copper, satellite, microwave or wireless).
- O I seek bids for internet access without data cransmission service and will arrange for separate data transmission service if required.
- 🔘 I seek bids to purchase data transmission service only (i.e., that does not include internet access service).
- I seek to build my own network.
- 🔘 I seek bids for wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use.

CANCEL

To edit the selection for a set of statements, click on the selected statement again to re-open the dropdown and see all the options.

## **'I SEEK BIDS...' (3/3)**



transmission service without internet access service."

## **CATEGORY ONE FUNCTION**

Basic Information

Service Requests

Technical Contact Information Procurement Information FCC Form 470 Review

Certifications & Signature

Please select the option below that matches the services for which you are seeking bids.

Visit our website for more information on how to file the FCC Form 470.

### **Add New Service Request**

• I seek bids for internet access and/or data transmission service.

**O** I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

I seek data transmission service without internet access service.

### Service Type

Data Transmission and/or Internet Access

### Function \*

Standalone Data Transmission Service

This service option does not include Internet access service; if this option is selected, the applicant will have to procure Internet access service separately.

After selecting the last 'I seek bids...' statement, the correct Service Type (Data Transmission and/or Internet Access) and Function (Standalone Data Transmission Service) will appear below. You'll also see a note in red reminding you to procure internet access separately.

### **SERVICE REQUEST DETAILS (1/2)**

### Service Type

Data Transmission and/or Internet Access

#### Function \*

Standalone Data Transmission Service

This service option does not include Internet access service; if this option is selected, the applicant will have to procure Internet access service separately.

Quantity * 1 Unit	Quantity refers to the number of lines or circuits requested. This example shows 1 circuit/line to connect two branches through data transmission only.
Each	
Minimum Capacity *	<b>Minimum Capacity</b> should reflect your library's current download speed.
100 Mbps 🗸 🗸	Maximum Capacity should reflect the highest
Maximum Capacity *	speed your library is seeking.
1 Gbps 👻	Be careful about units:
	• Mbps = megabits per second. Use this
CANCEL	for connections below gigabit.
	<ul> <li>Gbps = gigabits per second.</li> </ul>
	Recommended max for both fiber and non-
	fiber requests.

## **SERVICE REQUEST DETAILS (2/2)**

#### Service Type

Data Transmission and/or Internet Access

#### Function \*

Standalone Data Transmission Service

This service option does not include Internet access service; if this option is selected, the applicant will have to procure Internet access service separately.

<b>Qua</b> 1	Number of entities served = number of branch buildings to receive the service		Number of er	ntities served?*		
Uni Eacl Min 10	Best practice: check Yes for the question about installation, activation in case your library starts a new service with setup fees.	-	service? * • Yes • No	seeking Installation, Act the RFP(s) that apply to	tivation and Initial Confi o this service request.	guration for this
Ма 1 С СА	Check the box beside the RFP name only if this request is included in the document.	-		nobile Hotspot TEMPLATE ot Lending TEMPLATE	ATE ANOTHER REQUEST	SAVE REQUEST
	'Save & Create Another Request' will star request with all the same 'I seek bid state but those statements cannot be edited.			· · · · · · · · · · · · · · · · · · ·	st' will return y egory One Ser ge.	

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### NARRATIVE FOR WAN CIRCUIT REQUESTS

#### Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are responsive to your needs.

ALL BIDS MUST INCLUDE the Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Vendor must have the FY2024 Form 473/SPAC on file or the bid will be disqualified. Generic bids for internet access that do not confirm availability at the service delivery address and/or do not include specific special construction charges (if applicable) will be considered non-responsive and therefore disqualified.

QTY 1 FOR MONTHLY INTERNET AT 100 MAIN ST, BOONESBURG, KY 41700. Please quote download speeds between 100 Mbps and 1 Gbps, fees for 5 static IP addresses, and estimated taxes and other surcharges. Service start date is July 1, 2025.

QTY 1 TRANSPORT CIRCUIT BETWEEN 100 MAIN ST, BOONESBURG, KY 41700 AND 300 TULIP POPLAR LN, LOGANVILLE, KY 41800. Please quote download speeds between 100 Mbps and 1 Gbps and estimated taxes and other surcharges. Service start date is July 1, 2025.

QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. Service start date is July 1, 2025. Please see RFP document for details of this request.

QTY 10 LINE FOR OFF-PREMISES PATRON HOTSPOT LENDING including monthly service and devices. Service start date is July 1, 2025. Please see RFP document for details of this request.

Make sure the narrative and/or RFP documents cover all Category One service requests. More tips on the narrative appear in the section, <u>Form</u> <u>470: Crafting a Narrative</u>.

### INSTALLATION PAYMENT PLAN

When requesting Internet Access or Data Transmission, the Installment Payment Plan question will appear below the narrative field. It's VERY, VERY RARE to request this option. The majority of Kentucky public libraries will answer No to this question. Then Save & Continue.

### Installment Payment Plan

Are you seeking an installment payment plan for the non-discounted portion of any special construction changes associated with the request(s) listed above? \* Yes

💿 No

BACK DISCARD FORM

SAVE & SHARE SAVE & CONTINUE

#### **Installment Payment Plan**

Are you seeking an installment payment plan for the non-discounted portion of any special construction charges associated with the request(s) listed above? •

Yes

⊖ No

Over how many years do you wish to amortize the costs?

1

Please select a range of years above.

4

Do you prefer annual or monthly payments? \* Annual Monthly

### In the VERY, VERY RARE

instance when a library answers Yes to this question, additional fields appear for options to amortize costs.

### SERVICE REQUEST – BOOKMOBILE HOTSPOT

Return to Presentation Contents

## **ADD NEW SERVICE REQUEST**

### Service Requests: Category One

Function

Service

Type

Please enter the service requests below by selecting 'Add New Service Request'.

Function

Other

Use the blue Add New **Service Request button** to start a new service

туре		Description	Capacity	Capacity		reque	est.		
Data Transmission and/or Internet Access	Internet Access and Data Transmission Service		100 Mbps	1 Gbps	1	1	Each	Yes	
Data Transmission and/or Internet Access	Standalone Data Transmission Service		100 Mbps	1 Gbps	2	1	Each	Yes	
ative	l service i			D NEW SERVICE				EST REMOVE SERV	ICE REQUEST

Maximum

Capacity

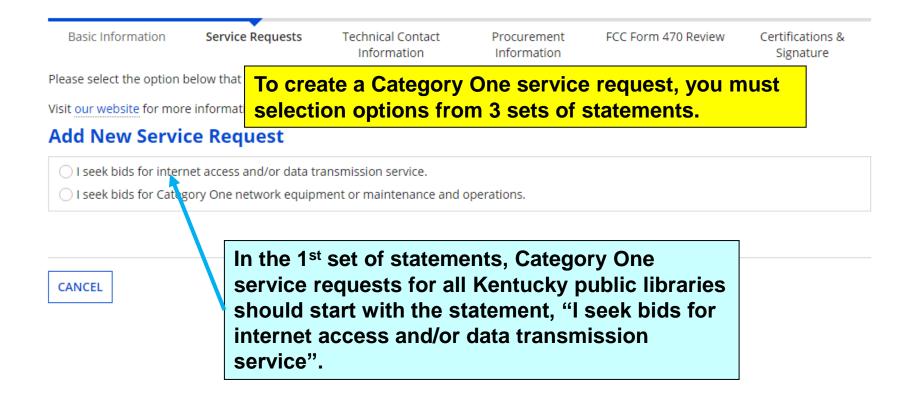
Entities

Minimum

Canacity

Completed service requests appear in a grid on the Service Requests: Category One page.

## **'I SEEK BIDS...' (1/3)**



# 'I SEEK BIDS...' (2/3)

**Basic Information** 

Service Requests

Please select the option below that matches the services for wh

Visit our website for more information on how to file the FCC Fe

**Add New Service Request** 

For the 2<sup>nd</sup> set of statements, almost all Kentucky libraries will select the first option: "I seek bids for internet access and transmission service..."

I seek bids for internet access and/or data transmission service.

I seek bids for Internet access and transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, microwave or wireless).

I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required.

🔘 I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

○ I seek to build my own network.

I seek bids for wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use.

CANCEL

To edit the selection for a set of statements, click on the selected statement again to re-open the dropdown and see all the options.

# **'I SEEK BIDS...' (3/3)**

Basic Information Service Requests Technical Contact Procurement Information FCC Form 470 Review Certifications & Signature Information

Please select the option below that matches the services for which you are seeking bids.

Visit our website for more information on how to file the FCC Form 470.

## **Add New Service Request**

**O** I seek bids for internet access and/or data transmission service.

● I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, microwave or wireless).

I seek bids for internet access and data transmission services, whether offered by one service provider(s) as a bundled package or offered by one or more service provider as independent services.

I seek bids for data plans or wireless adapters (Air Cards) for mobile devices for commercial wireless service for a school or library that does not have an existing broadband internal connection (e.g., for use on a library bookmobile without a fixed connection).

In the 3<sup>rd</sup> set of statements, select, "I seek bids for data plans or wireless adapters (Air Cards) for mobile devices for commercial wireless service for a school or library that does not have an existing broadband internal connections (e.g., for use on a library bookmobile without a fixed connection)."

# **CATEGORY ONE FUNCTION**

Basic Information

Service Requests

Technical Contact Information Procurement Information

FCC Form 470 Review

Certifications & Signature

Please select the option below that matches the services for which you are seeking bids.

Visit our website for more information on how to file the FCC Form 470.

## Add New Service Request

O I seek bids for internet access and/or data transmission service.

• I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).

• I seek bids for data plans or wireless adapters (Air Cards) for mobile devices for commercial wireless service for a school or library that does not have an existing broadband internal connections.

## Service Type

Data Transmission and/or Internet Access

## Function \*

Cellular Data Plan/Air Card Service

Cellular data plans and air cards for mobile devices are eligible only in instances when the school or library seeking support demonstrates that the individual data plans are the most cost-effective option for providing internal broadband access for mobile devices at schools and/or libraries.

After selecting the last 'I seek bids...' statement, the correct Service Type (Data Transmission and/or Internet Access) and Function (Cellular Data Plan/Air Card Service) will appear below, along with additional fields to complete. You'll also see a note in red because, *unless for a library bookmobile*, it's very difficult to receive discounts on cellular data.

# **SERVICE REQUEST DETAILS (1/2)**

### Service Type

Data Transmission and/or Internet Access

### Function \*

Cellular Data Plan/Air Card Service

Cellular data plans and air cards for mobile devices are eligible for on-premises that the individual data plans are the most cost-effective option for providing in use on a library bookmobile that cannot use a fixed connection). Quantity * 1 Unit Lines	
Minimum Capacity *	
10 Mbps 🗸 🗸	Capacity refers to the speed of the cellular
Maximum Capacity *	connection, not the amount of data usage
1 Gbps	allowed each month. While we normally
CANCEL	talk about cellular data speeds in terms like 4G, LTE, 5G, etc., you'll have to select approximate download capacities in megabits or gigabits per second. Minimum Capacity: 10 Mbps Maximum Capacity: 1 Gbps

# **SERVICE REQUEST DETAILS (2/2)**

## Service Type

Data Transmission and/or Internet Access

## Function \*

Cellular Data Plan/Air Card Service

Cellular data plans and air cards for mobile devices are eligible for on-premises use only in instances when the school or library seeking support demonstrates that the individual data plans are the most cost-effective option for providing internal broadband access for mobile devices at schools and/or libraries (e.g., for

Number of entities served = number of	
branch buildings (or the 'bookmobile'	Number of entities served?*
branch) to receive this service	1
Best practice: check Yes for the question about installation, activation in case your library starts a new service with setup fees.	Are you also seeking Installation, Activation and Initial Configuration for this service? *  Yes No Please select the RFP(s) that apply to this service request. *
Maximum Capacity *	RFP Bookmobile Hotspot TEMPLATE
Check the box beside the RFP name because Cellular Data Plan/Air Card	RFP Hotspot Lending TEMPLATE
Service requests require an RFP	SAVE & CREATE ANOTHER REQUEST SAVE REQUEST
document.	
'Save & Create Another Request' will start request with all the same 'I seek bid stater but those statements cannot be edited.	Save Pequest' will return you to

## NARRATIVE FOR BOOKMOBILE HOTSPOT REQUESTS

### Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- · Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are responsive to your needs.

ALL BIDS MUST INCLUDE the Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Vendor must have the FY2024 Form 473/SPAC on file or the bid will be disqualified. Generic bids for internet access that do not confirm availability at the service delivery address and/or do not include specific special construction charges (if applicable) will be considered non-responsive and therefore disqualified.

QTY 1 FOR MONTHLY INTERNET AT 100 MAIN ST, BOONESBURG, KY 41700. Please quote download speeds between 100 Mbps and 1 Gbps, fees for 5 static IP addresses, and estimated taxes and other surcharges. Service start date is July 1, 2025.

QTY 1 TRANSPORT CIRCUIT BETWEEN 100 MAIN ST, BOONESBURG, KY 41700 AND 300 TULIP POPLAR LN, LOGANVILLE, KY 41800. Please quote download speeds between 100 Mbps and 1 Gbps and estimated taxes and other surcharges. Service start date is July 1, 2025.

QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. Service start date is July 1, 2025. Please see RFP document for details of this request.

QTY 10 LINE FOR OFF-PREMISES PATRON HOTSPOT LENDING including monthly service and devices. Service start date is July 1, 2025. Please see RFP document for details of this request.

The RFP for Cellular Data Plan/Air Card Service must include details about the service, but basic information can be included in the narrative field. When using an RFP for any type of service request, it's always good to add a note in the narrative field to "see the RFP for details".

## SERVICE REQUEST – HOTSPOT LENDING

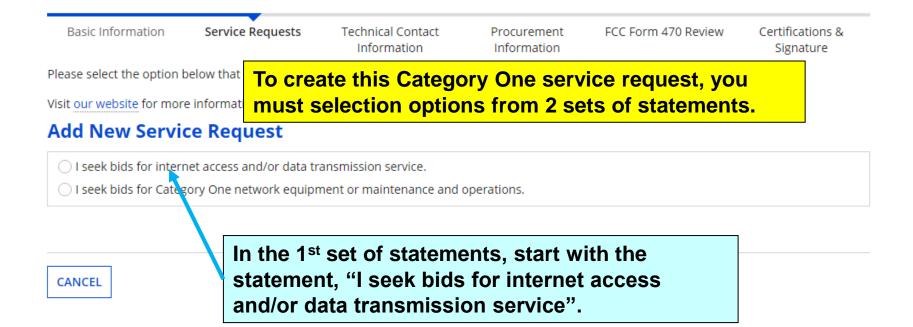
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Return to Presentation Contents

# ADD NEW SERVICE REQUEST

	Basic Information	Service Requests	Info	cal Contact rmation	Procurement	Inform			e blue A	dd New
er	vice Requests	ervices you are requesting <b>Category One</b> sts below by selecting 'Add N		Jest'.			to		t a new	est button service
	Service Type	Function	Minimum Capacity	Maximum Capacity	Entities	Qua		Unit	Initial Configuration?	Associated RFPs
	Data Transmission and/or Internet Access	Internet Access and Data Transmission Service	100 Mbps	1 Gbps	1	1		Each	Yes	
	Data Transmission and/or Internet Access	Standalone Data Transmission Service	100 Mbps	1 Gbps	2	1		Each	Yes	
	Data Transmission and/or Internet Access	Cellular Data Plan/Air Card Service	10 Mbps	1 Gbps	1	/		Lines	Yes	RFP Bookmobile Hotspot TEMPLATE
	1			ADD	NEW SERVICI	E REQU	EST	ED T SEF	<b>RVICE REQUEST</b>	REMOVE SERVICE REQUES
i	•	ervice reques he Service Re e page.								

# **'I SEEK BIDS...' (1/3)**



# **'I SEEK BIDS...' (2/3)**

Basic Information

Service Requests

Please select the option below that matches the services fo

Visit our website for more information on how to file the FO

## **Add New Service Request**

For the 2<sup>nd</sup> set of statements, select the last option: "I seek bids for wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use."

S I seek bids for internet access and/or data transmission service.

- I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, microwave or wireless).
- O I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required.

O I seek bids to purchase data transmission service only (i.e. that does not include internet access service).

O I seek to build my own network.

O I seek bids for wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use.

CANCEL

To edit the selection for a set of statements, click on the selected statement again to re-open the dropdown and see all the options. gnature

# **CATEGORY ONE FUNCTION**

Basic Information Service Requests Technical Contact Procurement Information FCC Form 470 Review Certifications & Signature Information

Please select the option below that matches the services for which you are seeking bids.

Visit our website for more information on how to file the FCC Form 470.

## **Add New Service Request**

I seek bids for internet access and/or data transmission service.

S I seek bids for wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use.

## Service Type

Data Transmission and/or Internet Access

## Function\*

Wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use

After selecting the last 'I seek bids...' statement, the correct Service Type (Data Transmission and/or Internet Access) and Function (Wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use) will appear below, along with additional fields to complete. Any request for hotspot lending starts with a bid for the monthly data service; you'll have an option later to add a request for new hotspot hardware, if needed.

# **SERVICE REQUEST DETAILS HOTSPOT DATA PLAN** (1/2)

### Service Type

Data Transmission and/or Internet Access

### Function \*

Wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use

Quantity* 10 Unit Each Minimum Capacity	Quantity refers to the number of monthly hotspot data plans needed; this number should include any existing hotspots and, if relevant, additional hotspots to be added at the start of the Funding Year.
<ul> <li>Maximum Capacity</li> <li>N/A</li> <li>✓ Please select this option to create an accompanying Category One Hotspot Devices request for this Hotspot Services request.</li> </ul>	The request for hotspot data plans does not require bandwidth to be listed.
-	at the bottom left to panying request for e.

# SERVICE REQUEST DETAILS HOTSPOT DATA PLAN (2/2)

### Service Type

Data Transmission and/or Internet Access

### Function\*

Wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use

0	u	а	n	ti	t	v	*	

For the monthly hotspot service request, the question about Installation, Activation, and Initial Configuration cannot be answered—the options are grayed out.

N/A

Check the box beside the hotspot lending RFP if you used one for this service request. Please note that an RFP document <u>isn't</u> required for hotspot lending, but the KDLA State E-rate Coordinator recommends using an RFP.

		service?	
		Ves	
,	Λ	No	
]		Please select the RFP(s) that apply to this service request.	
		RFP Bookmobile Hotspot TEMPLATE	
-		RFP Hotspot Lending TEMPLATE	
	/		

an also applying Installation. Astivation and Initial Configuration for th

See the next slide for hotspot hardware request details which will appear immediately below the hotspot data plan request.

# **SERVICE REQUEST DETAILS HOTSPOT HARDWARE** (1/2)

<ul> <li>Please select this option to create an accompanying Category One Hotspot Devices request for this Hotspot Services request.</li> <li>Service Type Data Transmission and/or Internet Access</li> <li>Function</li> </ul>	By checking the option to create an accompanying Hotspot Devices request, the additional service request for "Wi-Fi hotspots for off-premises use" will appear immediately below.
Wi-Fi hotspots for off-premises use	
Quantity* 10 Unit Each	Quantity refers to the number of hotspot device hardware needed. If your library already owns some devices, this quantity may be less than the quantity for the
Minimum Capacity	monthly hotspot data plans.
N/A Maximum Capacity N/A	The request for hotspot hardware does not require bandwidth to be listed.

SAVE & CREATE ANOTHER REQUEST SAVE REQUEST

# **SERVICE REQUEST DETAILS HOTSPOT HARDWARE** (2/2)

✓ Please select this option to create an accompanying Category One Hotspot Devices request for this Hotspot Services request.

## Service Type

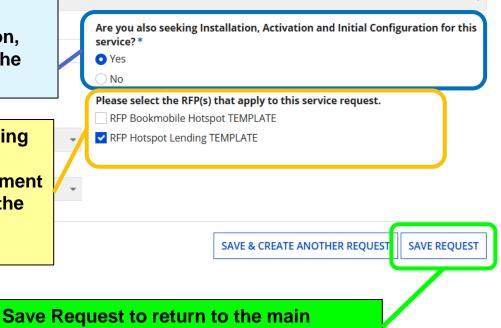
Data Transmission and/or Internet Access

Function

The hotspot device hardware request includes the question about Installation, Activation, and Initial Configuration. The answer should always be Yes.

**Minimum Capacity** 

Check the box beside the hotspot lending RFP if you used one for this service request. Please note that an RFP document <u>isn't</u> required for hotspot lending, but the KDLA State E-rate Coordinator recommends using an RFP.



Service Requests page.

# NARRATIVE FOR HOTSPOT LENDING REQUESTS

### Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are responsive to your needs.

ALL BIDS MUST INCLUDE the Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Vendor must have the FY2024 Form 473/SPAC on file or the bid will be disqualified. Generic bids for internet access that do not confirm availability at the service delivery address and/or do not include specific special construction charges (if applicable) will be considered non-responsive and therefore disqualified.

QTY 1 FOR MONTHLY INTERNET AT 100 MAIN ST, BOONESBURG, KY 41700. Please quote download speeds between 100 Mbps and 1 Gbps, fees for 5 static IP addresses, and estimated taxes and other surcharges. Service start date is July 1, 2025.

QTY 1 TRANSPORT CIRCUIT BETWEEN 100 MAIN ST, BOONESBURG, KY 41700 AND 300 TULIP POPLAR LN, LOGANVILLE, KY 41800. Please quote download speeds between 100 Mbps and 1 Gbps and estimated taxes and other surcharges. Service start date is July 1, 2025.

QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. Service start date is July 1, 2025. Please see RFP document for details of this request.

QTY 10 LINE FOR OFF-PREMISES PATRON HOTSPOT LENDING including monthly service and devices. Service start date is July 1, 2025. Please see RFP document for details of this request.

An RFP for hotspot lending will include details about the service, but basic information can also be included in the narrative field. When using an RFP for any type of service request, it's always good to add a note in the narrative field to "see the RFP for details".

## FORM 470: CRAFTING A NARRATIVE

Return to Presentation Contents

# NARRATIVE – ADVANTAGES

- The narrative field is your opportunity to explain your library's current situation and future needs.
   You can receive more accurate bids and anticipate questions vendors may have.
- A detailed narrative field also helps the KDLA State E-rate Coordinator when reviewing draft PDF versions of your form. If your narrative description doesn't match the service requests listed, she can help you fix those issues.

# WHAT TO INCLUDE IN THE NARRATIVE (1/2)

- NOT an exhaustive list:
  - Contract dates When does your library need this service to start? Most libraries request services that start on July 1<sup>st</sup> (first date for service in the funding year). Definitely include a date if your library's current contract ends mid-year.
  - Internet speeds and static IP addresses What are the minimum download and upload speeds you're seeking? Do you need static IP addresses, too?
  - Addresses Including addresses makes it easier for service providers to determine whether they can provide the requested service at those locations. Also, make sure to mention if a branch will move (temporarily or permanently) during the funding year due to construction.
  - Bidding Are there requirements for the formatting of bids or the method for submitting bids? Examples: separating costs by line item; bids to be submitted by email only; sealed bids to be delivered by mail or in person by a certain date/time

# WHAT TO INCLUDE IN THE NARRATIVE (2/2)

- NOT an exhaustive list (continued):
  - Compatible equipment If you're requesting Category Two products/services (such as a leased router from your Internet Service Provider), must the proposed equipment be compatible with other libraryowned equipment? What features/specs are most important?
  - Disqualification factors Does the service provider have a Service Provider Identification Number (SPIN/Form 498 ID)? Have they filed the Service Provider Annual Certification form (Form 473/SPAC) for the current funding year?
    - Disqualification factors <u>must</u> be clearly listed on the Form 470 (and/or in RFP document) & <u>must</u> be binary (Yes or No answers).
  - The narrative field is limited to 5,000 characters. If you need more space to describe your needs, considering uploading an RFP document.

# **EXAMPLE NARRATIVE – CAT1**

## **GENERAL BIDDING INFORMATION FOR ALL REQUESTS**

ALL BIDS MUST INCLUDE the Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Vendor must have the FY2024 Form 473/SPAC on file or the bid will be disqualified. Generic bids for internet access that do not confirm availability at the service delivery address and/or do not include specific special construction charges (if applicable) will be considered non-responsive and therefore disqualified.

## **INTERNET SERVICE REQUEST**

QTY 1 FOR MONTHLY INTERNET AT 100 MAIN ST, BOONESBURG, KY 41700. Please quote download speeds between 100 Mbps and 1 Gbps, fees for 5 static IP addresses, and estimated taxes and other surcharges. Service start date is July 1, 2025.

## WAN SERVICE (DATA TRANSMISSION ONLY) REQUEST

QTY 1 TRANSPORT CIRCUIT BETWEEN 100 MAIN ST, BOONESBURG, KY 41700 AND 300 TULIP POPLAR LN, LOGANVILLE, KY 41800. Please quote download speeds between 100 Mbps and 1 Gbps and estimated taxes and other surcharges. Service start date is July 1, 2025.

## **BOOKMOBILE HOTSPOT SERVICE REQUEST**

QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. Service start date is July 1, 2025. Please see RFP document for details of this request.

## HOTSPOT LENDING SERVICE REQUEST

QTY 10 LINE FOR OFF-PREMISES PATRON HOTSPOT LENDING including monthly service and devices. Service start date is July 1, 2025. Please see RFP document for details of this request.

FORM 470: TECH CONTACT & STATE/LOCAL PROCUREMENT

Return to Presentation Contents

# **TECHNICAL CONTACT PERSON**

Basic Information Service Requests Technical Contact Procurement Information Information Next, please name the person on your staff or project who can provide additional technical details or answer specific qu seeking. Technical Contact Person Is there a person who can provide additional technical details or answer specific First Name\* questions from service providers about the services you are seeking? Charlie Last Name \* YES 🗸 NO Dickens How would you like to enter the technical contact details? Title IT Coordinator ENTER DETAILS MANUALLY J SEARCH EPC SYSTEM Phone Number \* 555-555-5555

If needed, add a Technical Contact who can best answer specific questions about your library's internet connection and needs. When you select 'Yes', you must choose to search for an EPC user associated with your library or manually enter a contact.

WARNING: Absolutely do not list someone as a Technical Contact if that person is potentially a vendor who will respond to the Form 470!!!

55		
Email *		
dickensianlT@mailinator.c	om	
Re-enter Email*		
dickensianlT@mailinator.c	om	

Phone Number Extension

55

SAVE & SHARE SAVE & CONTINUE

# STATE OR LOCAL PROCUREMENT REQUIREMENTS

Basic Information

Service Requests Teo

Technical Contact Information Procurement Information FCC Form 470 Review Certifications & Signature

Next, you will enter all information regarding state and local procurement rules.

State or Local Procurement Perminent

Are there state or local procure



Reminder: Your library must receive sealed competitive bids to be opened at a specified date/time & location for procurement over \$40,000 with a single vendor. The details of the sealed bidding process must be included in the 470 and/or in an accompanying RFP document.

mapplicable, provide a description of state or local procurement rules and/or restrictions on how or when service providers may contact you or on other bidding procedures.

FOR LIBRARIES THAT ADOPTED THE MODEL PROCUREMENT CODE: Pioneer County Public Library has adopted the Kentucky Model Procurement Code (Kentucky Revised Statutes 45A.345-.460).

FOR LIBRARIES THAT DIDNT ADOPT THE MODEL PROCUREMENT CODE: Kentucky Revised Statute 424.260(1) requires sealed bids for contracts and purchases over \$40,000.

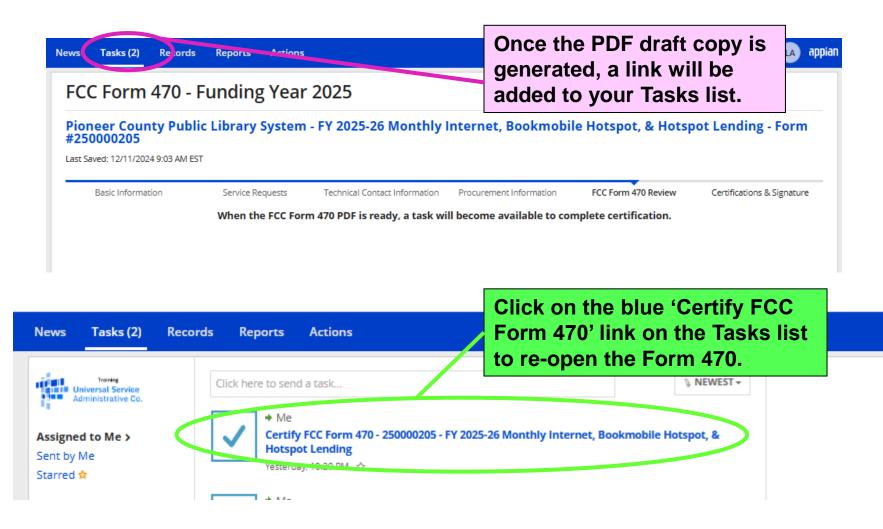
## BACK DISCARD FORM

Click on Review FCC Form 470 to start generating a draft PDF copy of the form suitable for sharing with the KDLA State Erate Coordinator! SAVE & SHAP

# FORM 470: REVIEW & CERTIFICATION

Return to Presentation Contents

# **REVIEW YOUR FORM 470**



# **DOWNLOAD DRAFT PDF COPY**

## FCC Form 470 - Funding Year 2025

Pioneer County Public Library System - FY 2025-26 Monthly Internet, Bookmobile Hotspot, & Hotspot Lending - Form #250000205 Click on the blue Download Last Saved: 12/11/2024 9:03 AM EST **Document Link. This will** open another browser tab Basic Information Service Requests Technical Contact Pro where you can choose to Information Info open or save the PDF. Please download and carefully review this FCC Form 470 before certifying. Download Document Link USAC\_FCC\_FORM\_470\_APPLICATION\_250000205\_DRAFT By checking this box, I certify that the information in the PDF document above is correct.

BACK

SEND FOR CERTIFICATION CONTINUE TO CERTIFICATION

# EMAIL THE DRAFT TO KDLA

library.system10.user1@mailinator.com

Number of Eligible Entities: 3

Contact Information

Lauren Abner

502-564-1728



FCC Form 470 – Funding Year 2025

Form 470 Application Number: 250000205 FY 2025-26 Monthly Internet, Bookmobile Hotspot, & Hotspot Lending

Billed Entity Pioneer County Public Library System 100 Main Street Boonesburg, KY 41700 Pioneer 111-222-3333 library.system10.user1@mailinator.com

Billed Entity Number: 208 FCC Registration Number: 0018429621

Application Type Applicant Type: Library System Recipients of Services: Bookmobile; Main Branch; Public Library, Public Library System

#### Consulting Firms

	Name	Consultant Registration Number	Phone Number	Email
- 1				

#### RFPS

ID	Name
375218	RFP Bookmobile Hotspot TEMPLATE
375219	RFP Hotspot Lending TEMPLATE

#### Category One Service Requests

Service Type	Function	Function Other Description	Minimum Capacity	Maximum Capacity	Entities	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs
Data Transmission and/or Internet Access	Internet Access and Data Transmission Service		100 Mbps	1 Gbps	1	1	Each	Yes	
Data Transmission and/or Internet Access	Standalone Data Transmission Service		100 Mbps	1 Gbps	2	1	Each	Yes	
Data Transmission and/or Internet Access	Cellular Data PlaniAir Card Service		10 Mbps	1 Gbps	1	1	Lines	Yes	375218

documents can be emailed to <u>lauren.abner@ky.gov</u> for review.

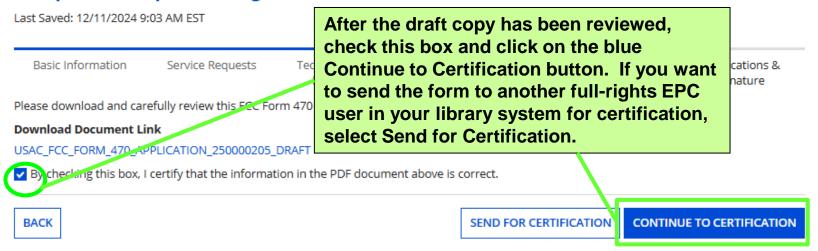
Draft 470s and RFP

You don't need to save the draft copy for your records; you'll be able to download the final, certified copy later.

# **CONTINUE TO CERTIFICATION**

## FCC Form 470 - Funding Year 2025

## Pioneer County Public Library System - FY 2025-26 Monthly Internet, Bookmobile Hotspot, & Hotspot Lending - Form #250000205



# YES TO PROCEED

Pioneer County Public I & Hotspot Lending - For	This function will send you directly Form 470. Do you wish to proceed			bile Hotspot
Last Saved: 12/11/2024 9:03 AM EST	NO		YES	
Basic Information Service Red	Information	Procurement Information	FCC Form 470 Review	Certifications & Signature
Download Document Link           JSAC_FCC         Confirm that           By chec         directly to ce	you want to proce rtification.	ed <sub>t.</sub>		
				JE TO CERTIFICATION

# **CHECK CERTIFICATIONS**

## Certify FCC Form 470

## Pioneer County Public Library Sys Hotspot, & Hotspot Lending - Forr

Last Saved: 12/11/2024 9:03 AM EST

Basic Information

Service Requests

Please complete the certifications below.

## Applicant Certifications

carchy that the applicant includes libraries or morary services and Technology Act of 1996 that do not oper have budgets that are completely separate from any universities). You must agree to all of the certifications to post the Form 470. The certifications confirm that your library is eligible and will follow all E-rate program rules and laws regarding competitive bidding.

## **Other Cartifications**

certify that this FCC Form 470 and any applicable RFP will be available for review by potential bidders for at least 28 days before considers received and selecting a service provider. I certify that all bids submitted will be carefully considered and the bid selected will be for cost-effective service or equipment offering, with price being the primary factor, and will be the most cost-effective means of meeting needs and technology goals.

I certify that I will retain required documents for a period of at least 10 years (or whatever retention period is required by the runtime of this certification) after the later of the last day of the applicable funding year or the service delivery deadline for the associated

existing data sources, gathering and maintaining the data needed, completing, and reviewing the collection of information. Send comments regarding this determinate or any other aspect of this collection of information, including suggestions for reducing the reporting burden to the Federal Commencations Commission, Performance Evaluation and Records Management, Washington, DC 20554. We also will accept your comments via the email if you send them to PRA@FCC.gov. DO NOT SEND COMPLETED WORKSHEETS TO THESE ADDRESSES.

for Certify button

CERTIF

Scroll

# **CERTIFICATION - WARNING**

## amended. 47 U.S.C. § 254. The data in the report will be used to ensure that schools and libraries comply with the competitive bidding requirement contained in 47 C.F.R. § 54.503. Schools and libraries must file this form themselves or as part of a consortium.

An agency may not conduct or sponsor, and a number.

The FCC is authorized under the Communicat provide to determine whether you have comp there may be a violation or a potential violatio Federal, state, or local agency responsible for information you provide in this form may be o or (c) the United States Government is a party submitted with this form, or in response to su regulations, the Freedom of Information Act, s False statements on this form may result in civil liability and/or criminal prosecution. To electronically sign and certify this form, click "Yes" below. To affirm that you (1) understand the statements above and (2) represent the entity featured, and have the authority to make the certifications, on this form, click "Yes" below.

YES Co

displays a currently valid OMB control

form. We will use the information you universal service discounts. If we believe provide in this form may be referred to the gulation or order. In certain cases, the n (a) the FCC; or (b) any employee of the FCC; addition, information provided in or Communications Act of 1934, FCC

If you owe a past due debt to the federal government, the information you provide in this tors, may also be disclosed to the Department of the Treasury Financial

Management Service, other Federa provide the information to these as

If you do not provide the informati request for universal service discou

The foregoing Notice is required by

Public reporting burden for this col existing data sources, gathering an estimate or any other aspect of this Performance Evaluation and Record Confirm that you understand that you may be subject to prosecution for making false statements on this form and that you are authorized to represent your library. pllect that debt. The FCC may also

without action or deny a related

reviewing instructions, searching d comments regarding this burden deral Communications Commission, you send them to PRA@FCC.gov. DO

NOT SEND COMPLETED WORKSHEETS TO THESE ADDRESSES.

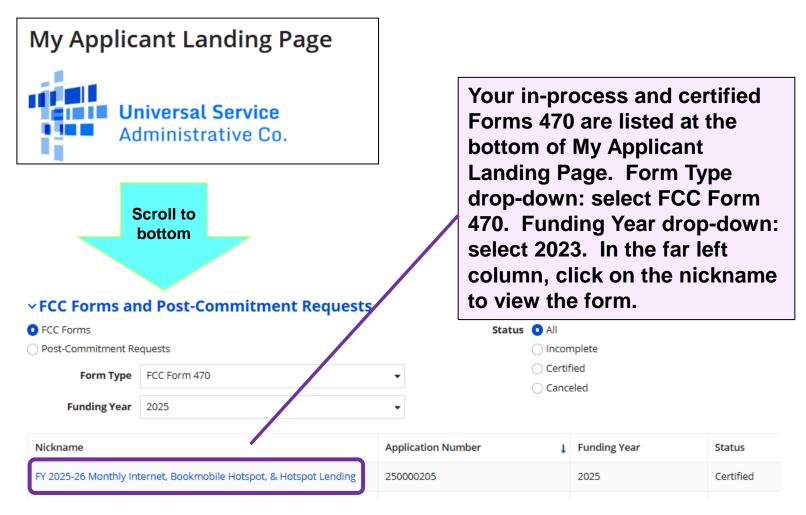


CERTIFY

# BACK TO MY LANDING PAGE

News Tasks	Records	Reports	Actions	Appian
Training Universal Service Administrative Co		Click here to s	send a task	NEWEST -
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DEADLINE			list again. You likely won't have any	
Overdue			additional tasks. Click on the USAC	
Today			logo to return to My Applicant Landing	
Within 7 days			Page.	

# **VIEW YOUR CERTIFIED FORM**



# **PRINT YOUR FORM 470**

News Tasks (1) Records Reports Actions	III 🗛 appian					
Records / FCC Forms 470						
FY 2025-26 Monthly Internet, Bookmobile Hotspot, & Hotspot Lending - #250000205						
Summary Generated Documents News Related Actions	After following the link to your Form 470 from My Applicant					
Generated FCC Forms 470	Landing Page, click on the					
FCC Form 470 Version	Generated Documents tab near					
Original Version	the top of the page.					

The Original Version link opens a PDF copy of the form as it appeared when you certified it. If you upload an addendum to RFP documents (like answers to vendor questions), then you'll also see a Current Version link on this page.

## ALLOWABLE CONTRACT DATE & BID EVALUATIONS

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## ALLOWABLE CONTRACT DATE

#### Records / FCC Forms 470

FY 2025-26 Monthly Internet, Bookmobile Hotspot, & Hotspot Lending e #250000205



The Summary page for your form will include an Allowable Contract Date (ACD), which is 28 calendar days after the form was certified. Keep in mind that your actual ACD may be later depending on what you

Last Modified Date 12/11/2024 9:09 AM EST

Last Modified By Lauren Abner

act

### USAC EMAIL FOR ALLOWABLE CONTRACT DATE

Fwd: EPC Notification: Allowable Contract Date Reached for FCC Form 470 # 250002714

TJ To Abner, Lauren (ELC)		٢	← Reply	≪  Reply All	→ Forward Thu 11/14	1/2024 10	 D:12 AM
(i) If there are problems with how this message is displayed, click here to view it in a web	browser.						
Selecting Service Providers PDF.pdf 201 KB	A PDF with instructions on vendor						
Universal Service	selection will be	e a	ttach	ed.			
Administrative Co.							
Helle							

Hello,

The Allowable Contract Date for FCC Form 470 #250002714 has been reached. You may now close your competitive bidding process unless state and local procurement laws require you to keep the bidding open longer.

Your next step is to evaluate the bids received, select the winning service provider, and then enter into a legally binding agreement or sign a contract.

Click the link below to view your FCC Form

Form 470 Dashboard

You'll receive a notice 28 calendar days after filing a Form 470 indicating that the earliest possible Allowable Contract Date has been reached.

# **BID EVALUATIONS (1/2)**

## Don't make any decisions or sign contracts until your Allowable Contract Date (ACD) has been reached.

- Unless your narrative or RFP specified a due date, you may continue collecting bids after 28 calendar days
- If you received only 1 bid, then you should email yourself to memorialize this fact.
- If you contact vendors to request cost proposals after you file your Form 470 – do not give those vendors additional information not listed in the narrative or RFP.

# **BID EVALUATIONS (2/2)**

## Must evaluate all valid bids using E-rate eligible cost as the primary factor

- You should reply to requests for additional information needed to create a responsive bid. Be careful about changing the scope of your requests (ex: adding new locations for service)—that could force you to restart competitive bidding for another 28 days.
- Spam generic email asking you to call or email to request a quote – is not considered a responsive bid and you don't have to reply.
- You may disqualify certain bids <u>if</u> you stated those disqualification factors on the Form 470.
- You may consider relevant State Master Contracts as bids.



#### Sample Bid Evaluation Matrix

FACTOR	POINTS AVAILABLE	VENDOR 1	VENDOR 2	VENDOR 3
Price of the eligible products and services	50*	20	50	40
Prior experience with the vendor	25	25	0	25
Prices for ineligible services and products	15	10	5	15
Local or in-state vendor	10	10	0	0
TOTAL	100	65	55	80

\*This number must be higher than all other numbers in the same column.

#### List of Disqualified Bidders

• Vendor 4

Reason for disqualification: All interested bidders received two weeks' notice of a required pre-bid conference. Vendor 4 did not attend this conference and did not provide a reason for their absence.

For more information on constructing a bid evaluation, visit the USAC website at: <u>https://www.usac.org/e-rate/applicant-process/selecting-service-providers/how-to-construct-an-evaluation/</u>

#### Available for Public Use

#### Important things to note about this sample:

The price of the eligible products and services must be the most heavily weighted factor. This means that it must have the highest number of "Points Available." In this sample, the vendors could score up to 50 points for the price of eligible services factor (more than any other single factor).

The applicant rated the vendors on how well they met each factor. Then, they totaled the vendors' point values for all factors.

Vendor 3, with a total of 80 points, is the winning bidder in this sample because they have the highest total number of points.

The applicant disqualified Vendor 4 and noted the reason for disqualification on the bid evaluation matrix (see the "List of Disqualified Bidders" below the matrix).

#### http://www.usac.org/\_res/documents/sl/pdf/samples/Bid-Evaluation-Matrix.pdf

## SAMPLE BID MATRIX – E-RATE CENTRAL

- E-rate Central, an E-rate consulting firm, has a sample bid evaluation matrix: <u>http://e-</u> <u>ratecentral.com/applicationTips/bidAssessment/Comp</u> <u>etitiveBidResponseDocumentation.asp</u>
- KDLA neither recommends nor discourages applicants to use this particular bid matrix, but it does provide an example of how to track incoming bids and organize bid evaluations for several products/services by using multiple tabs on an Excel spreadsheet. Applicants should modify the spreadsheet to reflect the factors important to their situation.

## DOCUMENT RETENTION – SAVE IT ALL!

- Save <u>everything</u> related to E-rate filing. The document retention period is 10 years from the last date for service in the funding year.
  - FCC Forms
  - Any correspondence from USAC or the FCC.
  - Copies of <u>all</u> responsive bids (not just the winning bid)
  - Contracts or agreements with service providers
  - Copies of bid evaluation form/decision process for choosing winning bid
  - Invoices and proof of delivery, service, etc.

## LOOKING AHEAD – THE FORM 471

- The Form 471 application for Funding Year 2025 will likely be released in mid-January 2025 (TBD).
- Prior to filing the Form 471, you must complete the competitive bidding process and, if required, sign a contract or make a legally-binding agreement with the vendor chosen through the bidding process.
- KDLA will provide updated Form 471 training in January 2025 dates TBD.

# **WRAP-UP**

Return to Presentation Contents

# RESOURCES

#### KDLA's E-rate page

<u>https://kdla.ky.gov/Library-Support/Library-Programs/E-rate/Pages/default.aspx</u>

### USAC Form 470 Filing page – new tools!

<u>https://www.usac.org/e-rate/applicant-process/competitive-bidding/fcc-form-470-filing/</u>

### USAC Client Service Bureau

• 1-888-203-8100 or through the E-rate Productivity Center

## SIGN UP FOR KYTECH LISTSERV®

### For Library Technology Support Staff:

 KYTECH is a monitored discussion list devoted to those who work with technology for their library. By using this LISTSERV®, individuals from around the state will have the chance to ask questions, share ideas, voice concerns, and make valuable contacts all through their e-mail.

 TO SUBSCRIBE: Send a blank message to: joinkytech@listserv.ky.gov

# E-rate updates and reminders are posted to KYTECH.



# Thanks for listening!

Lauren Abner State E-rate Coordinator <u>lauren.abner@ky.gov</u> (502) 564-1728 <u>Book time with me</u> For E-rate questions or for assistance with filing forms, please contact KDLA.



KDLA's E-rate support is funded in part by the IMLS Grants to States program.

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