

E-rate Form 470 for Category Two Funding Year 2020



**YOUR E-RATE ADVENTURE
CONTINUES...HOP IN!**

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Updated Version 12/12/19

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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

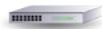
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E-RATE FUNDING YEARS

Download latest chart from KDLA E-rate page:

<https://kdla.ky.gov/librarians/programs/e-rate/Pages/Funding-Years.aspx>

E-rate Funding Years – Dates to Remember

KDLA E-rate support: Lauren Abner lauren.abner@ky.gov or 502-564-1728	Application Process			Recurring Services		Non-Recurring Services	
	Form 470 – Competitive Bidding 	Form 471 – Application to Request Discounts 	Form 486 – Service Start Date + CIPA Certification 	Service Dates for Category One or Two 	Invoicing Deadline (BEAR/472) 	Service Dates for Category Two Purchase/Installation 	Invoicing Deadline (BEAR/472) 
Funding Year 2018 (FY 2018-19)	Closed	Closed	120 days from: FC DL or Service Start Date (whichever is later)	July 1, 2018 to June 30, 2019	October 28, 2019	April 1, 2018 to Sept. 30, 2019	January 28, 2020
Funding Year 2019 (FY 2019-20)	Closed	Closed	120 days from: FC DL or Service Start Date (whichever is later)	July 1, 2019 to June 30, 2020	October 28, 2020	April 1, 2019 to Sept. 30, 2020	January 28, 2021
Funding Year 2020 (FY 2020-21)	July 1, 2019 to February 2020 Estimated dates to open bidding	Mid-January to Mid-March 2020 Estimated Form 471 filing window	120 days from: FC DL or Service Start Date (whichever is later)	July 1, 2020 to June 30, 2021	October 28, 2021	April 1, 2020 to Sept. 30, 2021	January 28, 2022
Notes	Most libraries open competitive bidding each year and must wait at least 28 calendar days to select vendor(s).	All libraries must file the Form 471 every year to receive a funding commitment.	All libraries must file the Form 486 to release funding for invoicing; FC DL = Funding Commitment Decision Letter	Both Category One and Two services may be recurring (ex: monthly internet)	May request one 120-day extension by the deadline	Non-recurring = one-time purchases such as network equipment	May request one 120-day extension by the deadline

TIMELINE FOR FY 2020

- **Competitive Bidding for FY 2020 services**
 - Opened July 1, 2019 (Form 470 released)
 - **Last date to open competitive bidding: February 20, 2020 (*projected – date not finalized*)**
- **When Services Will Happen for FY 2020**
 - Recurring Services: July 1, 2020 to June 30, 2021
 - Includes: Category One monthly internet access or transport services; Category Two basic maintenance of eligible equipment)
 - **Non-recurring Services: April 1, 2020 to September 30, 2021**
 - **One-time Category Two purchase/installation**

TIME TO UPDATE PROFILES

The 'administrative window' to update entity profiles will remain open until the Form 471 filing window begins.

- **Has a branch's address, phone #, or square footage changed?**
 - Update information in the [E-rate Productivity Center](#)
 - If the square footage will change before September 30, 2021 due to construction, make sure you have documentation to verify the new square footage before the Form 471 for Category Two is filed.
- **Are you opening or closing branches during FY 2020?**
 - 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:
<https://www.usac.org/e-rate/applicant-process/before-you-begin/eligible-services-list/>
- Eligible services are separated into two broad categories:
 - Category One: Connectivity to the Building
 - Category Two: Connectivity to the Device

Finalized Funding Year 2020 Eligible Services List released December 9, 2019:

<https://docs.fcc.gov/public/attachments/DA-19-1249A1.pdf>

CATEGORY ONE

- **Data Transmission Services & Internet Access**
 - **Monthly Internet service for branch buildings, including installation** – lines/circuits can be fiber or non-fiber (coax cable, DSL, 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 copper-to-fiber converter” may be eligible as part of your library’s internet access. – **contact KDLA technology consultant for reference document (removed from USAC website during November 2019 website redesign)**
 - Fees for router from the internet service provider may be eligible under Category One in limited circumstances. See USAC’s [Q9 of FAQs: Eligible Fiber Services](#)
 - **Leased data lines (T1, lit fiber, dark fiber, etc.)**
 - **Cellular data (hotspot service) for bookmobile only**
 - **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
Funding Year 2020:
July 1, 2020 to June 30, 2021**

**No budget limit on
Category One requests**

CATEGORY TWO- IC

Internal Connections

- Antenna, connectors, & related components
- Cabling
- Switches
- Routers
- Access points
- Wireless controller systems
- Firewalls**
- UPS (Uninterruptible Power Supply)**
- Racks**
- Caching services or equipment
- Software supporting components on the list used to distribute broadband through the library – ex: licenses for access points

**Some restrictions apply

If your library leases a router from your internet service provider, then request bids for Category Two Internal Connections for Function: Router.

More flexibility – equipment can be installed as soon as April 1, 2020 or as late as September 30, 2021.

These eligible functions can be virtualized in the cloud or combined in equipment (like routing and switching).

CATEGORY TWO – BMIC & MIBS

Basic Maintenance of Internal Connections

- 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)



Funds for Learning has a good explanation of [Basic Maintenance of Internal Connections \(BMIC\)](#).

MISCELLANEOUS

May fall under Category One or Two:

- Some taxes, surcharges, and other similar, reasonable charges
 - Federal Access Recovery Charge on internet invoices – permissible charge for use of a local carriers 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”
- 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 3rd party rather than the vendor who sold the equipment

DUPLICATIVE SERVICES

Caution – E-rate does **not** provide discounts for services that are considered duplicative. Examples: internet access or networking equipment that is used as backup, redundancy, failover, etc.

If the connections serve different populations (internet for public, internet for staff), they may 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/librarians/staffdevelopment/kdlaarchivedwebinars/Pages/default.aspx>



CATEGORY TWO BUDGETS

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WHAT'S MY DISCOUNT RATE?

E-rate discounts are based on two criteria:

- Percentage of students eligible for the National School Lunch Program in the local school district where your main library branch is located.
 - The school district submits this data, not the library—easy!
- Rural or urban classification of the county served by the library
 - USAC has an Urban/Rural Lookup Tool on its website:
<https://sltools.universalservice.org/portal-external/urbanRuralLookup/>

Look at Discount Matrix (next slide) for discount rate

DISCOUNT MATRIX

Discounts are similar for Category One and Category Two eligible services, but Category Two is capped at 85% for the top discount bracket.

INCOME Measured by % of students eligible for the National School Lunch Program (NSLP)	CATEGORY ONE (C1)		CATEGORY TWO (C2)	
	URBAN Discount	RURAL Discount	URBAN Discount	RURAL Discount
Less than 1%	20%	25%	20%	25%
1% to 19%	40%	50%	40%	50%
20% to 34%	50%	60%	50%	60%
35% to 49%	60%	70%	60%	70%
50% to 74%	80%	80%	80%	80%
75% to 100%	90%	90%	85%	85%

CAT2 BUDGETS FY 2015-19

- The Category Two budget is a pre-discount amount on which a library can request discounts over a 5-year period
- Cat2 budget is based on the square footage within enclosed walls and for FY 2019 was specific to the library branch
 - Exception: The costs for equipment/services shared by multiple branches will be divided between the branches for which support is sought.
 - Includes eligible kiosks and bookmobiles
 - See [eligibility requirements](#) on KDLA website
 - Excludes administrative-only branches (called non-instructional facilities or NIFs)

NEW CAT2 RULES FOR 2020

- On December 3, 2019, the FCC [released a report and order](#) to adopt the Category Two budget approach permanently for FY 2020 and forward.
- **For Funding Year 2020 Category Two ONLY:**
 - Budget multiplier for most libraries is \$2.99/sq. ft. with estimated inflation adjustment (TBD)
 - Budget multiplier for urban libraries with locale codes 11, 12, or 21 is \$6.52/sq. ft. with estimated inflation adjustment (TBD)
 - Minimum pre-discount budget for libraries below 4,000 sq. ft. is \$11,998.43 with estimated inflation adjustment (TBD)
 - Budgets will still be calculated at the branch level—each eligible branch will have a separate budget (same as FY 2015-2019)
 - The pre-discount cost of Cat2 funding commitments from FY 2015-2019 will count against each branch's budget – extends the 5-year budget cycle for an additional year

BIG CHANGES FOR 2021

- **Starting in Funding Year 2021:**
 - **A new, fixed 5-year budget periods will begin.** The first budget period will run from FY 2021-2025.
 - **All libraries will have \$4.50/sq. ft. as the budget multiplier,** including urban libraries that previously qualified for more funding
 - **Inflation adjustments will be made once at the start of the 5-year budget period rather than annually**
 - **Budget floor will be \$25,000 pre-discount** for libraries below 5,555 square feet
 - **Budgets will be calculated at the system level** rather than the branch level
 - **The equipment transfer rules will change** – must keep equipment for 3 years after purchase, can transfer within the library system during that period; make transfer notes in inventory (no more filing Form 500 for transfers)

CONSTRUCTION? GET MORE CAT2!

- **Cat2 budget increases** when the library will gain finished, interior square footage by the service delivery deadline for that funding year (September 30th following the end of the funding year). Get documentation ready before filing a Form 471 application for discounts.



WHAT **REDUCES** MY CAT2 BUDGET(S)?

- **Cat2 budget is reduced when Cat2 funding is committed.** Even if the library doesn't purchase the products/services or doesn't file the invoicing paperwork for the E-rate discount, the Cat2 budget is still reduced.
 - See later slides on the importance of filing the [Form 500](#) when Cat2 funding won't be used.

FORM 500 (1/2)

Reasons to file the Form 500:

- To adjust the **Service Start Date** on a previously filed Form 486
- To request an extension of the **service delivery and installation deadline for non-recurring services** (example – construction/renovation delays causing Cat2 installation delays)
- To adjust the **Contract Expiration Date** listed on the Form 471; libraries usually have to extend the contract with their vendor if there are construction delays
- **To cancel or reduce the amount of a funding request (irrevocably!)**
- To notify **USAC of an equipment transfer** within the three year prohibition on equipment transfers due to a temporary or permanent entity closure – *please note this requirement is eliminated for FY 2021 and forward*

FORM 500 (2/2)

The Form 500 is filed in the [E-rate Productivity Center](#)

- **For Funding Year 2016 and forward**, the form is filled out electronically
- **For Funding Year 2015 and prior**, you must download a paper copy of the form, fill it out by hand, and then upload it in the E-rate Productivity Center

More information on USAC website:

- <https://www.usac.org/e-rate/applicant-process/before-youre-done/fcc-form-500-filing/>

CATEGORY TWO BUDGET TOOLS

Records / Applicant Entities

#17016506 - KDLA Clark-Cooper Building



Summary Modifications Additional Information **Category Two Budget** Contracts FCC Forms News Related Actions

Category Two Budget Status

Note:

The Category Two Budget calculation reflects FRN data starting in FY 2016.

All budget cycles are displayed but the below results can be sorted using the columns.

Budget cycles as a result of the FCC Hurricane Order 17-139 will be visible after certification of a FCC Form 471 with the Directly Impacted Entity listed as a Recipient of Service on a Category Two FRN.

<input type="checkbox"/>	BEN Name	BEN Number	Budget Cycle Name	C2 Budget Amount	C2 Committed Amount	Remaining Balance	Pending C2 Requested Amount
<input type="checkbox"/>	KDLA Clark-Cooper Building	17016506	Budget Cycle 1	\$327,966.30	\$0.00	\$327,966.30	\$0.00

Approved and pending Category Two funding from FY 2016 and forward is tracked in each branch's profile in the [E-rate Productivity Center](#): Go to My Applicant Landing Page, click on a library branch name, select the Category Two Budget tab, then click on the button for GET CATEGORY TWO BUDGET INFORMATION.

Category Two information for Funding Year 2019 and previous is found in the Category Two Budget Tool on the main USAC website: <https://sltools.universalservice.org/portal-external/budgetLookup/>. Many factors affect your potential budget—talk to the KDLA Technology Consultant.

COMPETITIVE BIDDING OVERVIEW

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COMPETITIVE BIDDING

On the Form 470, applicants describe the E-rate eligible services they need. Potential service providers have at least 28 calendar days to respond with bids.

- No decision about which service provider(s) to use can be made before 28 calendar days have elapsed.
- You can wait longer if you want; you must wait longer if you release an RFP document with a later due date.

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

OPEN & FAIR PROCESS

- Open and fair competitive bidding is a core E-rate principle
- 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.

PRICE IS PARAMOUNT

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

- **E-rate eligible costs 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.

CATEGORY TWO VENDORS

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VENDOR E-RATE RESPONSIBILITIES

- Vendors—usually referred to as Service Providers in the context of E-rate—need to be willing to file certain forms and make certain certifications in order for you to receive your E-rate refunds
 - **1st Year:** Obtaining a **Service Provider Identification Number (SPIN/Form 498 ID)** by filing a Form 498 — must be filed in the separate ‘E-File’ system for service providers; very different than the version of the Form 498 filed by applicants in the E-rate Productivity Center
 - **Every Year:** Filing a **Service Provider Annual Certification (SPAC)** Form (Form 473) every year schools or libraries request E-rate discounts associated with their SPIN.
- You can’t request discounts for services from a vendor that doesn’t have a SPIN/Form 498 ID.
- E-rate funding can’t be disbursed if the vendor’s SPAC hasn’t been filed for the relevant year.

MEETING WITH VENDORS

- USAC guidance on meeting with vendors during Fall 2019 Applicant training. See [Advanced Track Application Process \(Pre-Commitment\) presentation](#):
 - **Service Providers can:**
 - Have pre-bidding discussions with applicants (**don't** talk about prices)
 - Discuss new product offerings with applicants.
 - Teach applicants about new technologies.
 - Note, however, that all parties must be privy to the same information during the competitive bidding process. Don't invite only 1 potential bidder.
 - **Only applicants can determine the types of service to list on the Form 470; the vendor cannot provide a list of exactly what to include on the Form 470.**
 - **Applicants cannot:**
 - Have a relationship with service providers that would unfairly influence the outcome of the competition.
 - Furnish service providers with inside competitive information.
 - Have ownership interest in a service provider's company competing for services.
 - Fail to describe the desired products and services with sufficient specificity to enable interested parties to bid.
 - Receive gifts or donations from service providers that violate FCC rules or seek to circumvent FCC rules.

NON-TRADITIONAL PROVIDERS

- Many local vendors that will perform installation of Category Two equipment are considered 'Non-Traditional Providers' for the E-rate program. Their E-rate responsibilities are much lighter than those of 'traditional' providers like telecoms.
 - Example: Telecoms have to report telecommunications revenues. Non-traditional Category Two vendors don't.
- Local vendors may need some help in getting started with the E-rate program. A couple of suggestions:
 - Ask them to contact to the KDLA Technology Consultant; KDLA cannot endorse a vendor, but I can describe basic vendor responsibilities for Category Two and general E-rate program information.
 - Vendors that need help with filing the Form 498 or the SPAC form can contact the USAC Client Services Bureau at 1-888-203-8100

WHY THIS MATTERS TO YOU

- Many libraries understandably want to support local businesses, but if E-rate discounts are an essential component of financing network upgrades, you have to find vendors that are willing to file some E-rate forms.
- **Best practice:** Always demand a SPIN/Form 498 ID on cost proposals received in response to the Form 470

REQUEST FOR PROPOSAL (RFP)

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WHAT RFP MEANS FOR E-RATE

In the world of E-rate, request for proposal (RFP) means any additional documents that describe the library's needs beyond the narrative field on the Form 470

- May be a lengthy, formal document such as those issued by cities, counties, or state government for large procurements
- May be a short document that outlines the library's technology needs and details for submitting a cost proposal.
- All RFP documents and addenda must be uploaded with the Form 470 in the E-rate Productivity Center, even if those documents are posted elsewhere online.

BENEFITS OF USING RFPs

- RFPs are an excellent way to exert more control over the procurement process, particularly if your library requests significant network upgrades.
- The narrative field on the Form 470 is limited to 5000 characters—you may want more space and document formatting options to describe your needs fully and clearly.
- The process of putting together an RFP forces you to consider more thoroughly what technology upgrades matter most to the community your library serves.

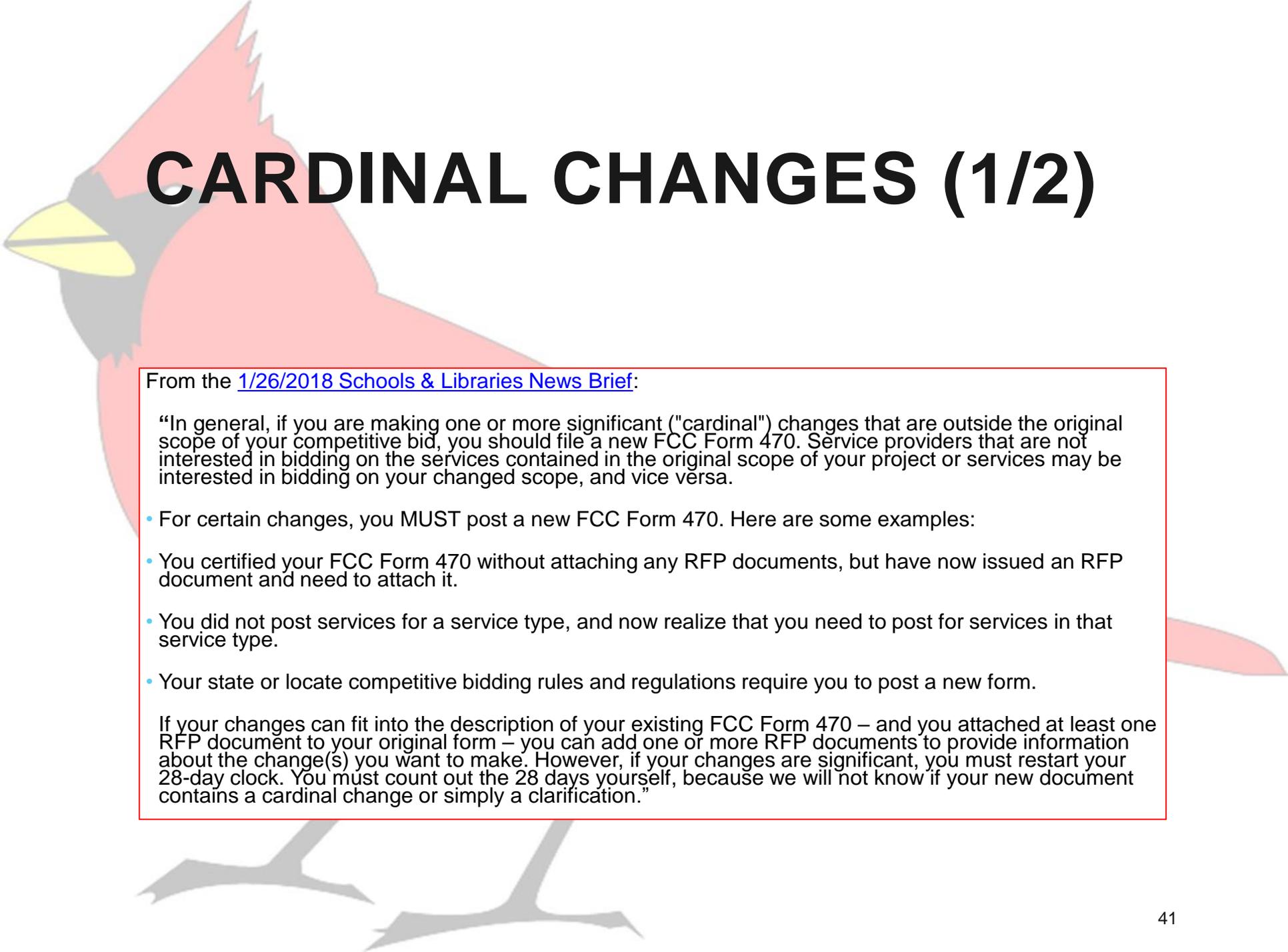
THE ELEMENTS OF THE RFP

- **Basic description of your library's situation** – location, current network setup, what you're trying to accomplish, etc.
- **Detailed list of anticipated needs**
- **Requirements for cost proposals** – separate by line item, include the SPIN/Form 498 ID, method of delivery (mail, e-mail, in-person), etc.
- **How the bids will be evaluated** – Are there disqualification factors? Those must be listed in the RFP. Will you give additional points for certain factors (flexible invoicing, previous experience with the vendor, attending walkthroughs, etc.)?
- **Important dates** – when cost proposals are due; dates for walkthroughs if they're being offered; public bid opening date/time/location (if requesting sealed bids); vendor question due date; approximate date for installation, etc.
- **Contact person**

DATES & RFPs

Some things to keep in mind about RFPs and due dates:

- The minimum 28 calendar-day competitive bidding window begins when the Form 470 is posted or the RFP is issued—**whichever comes later**.
- You may need to coordinate the release of the 470 & RFP with required notices for \$30,000+ procurements (see later section on state bidding rules)
- The larger and more complex your needs, the later you'll want the due date to be—to get better bids, have more time for walkthroughs, etc.



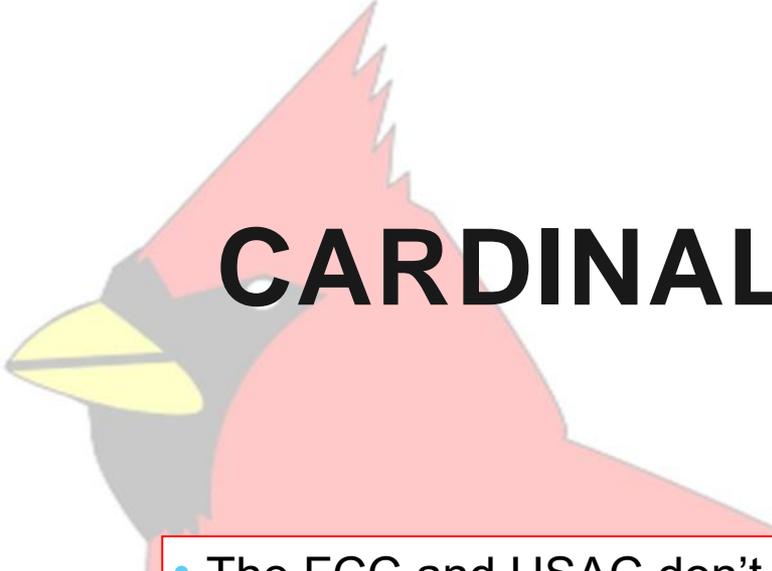
CARDINAL CHANGES (1/2)

From the [1/26/2018 Schools & Libraries News Brief](#):

“In general, if you are making one or more significant ("cardinal") changes that are outside the original scope of your competitive bid, you should file a new FCC Form 470. Service providers that are not interested in bidding on the services contained in the original scope of your project or services may be interested in bidding on your changed scope, and vice versa.

- For certain changes, you MUST post a new FCC Form 470. Here are some examples:
- You certified your FCC Form 470 without attaching any RFP documents, but have now issued an RFP document and need to attach it.
- You did not post services for a service type, and now realize that you need to post for services in that service type.
- Your state or local competitive bidding rules and regulations require you to post a new form.

If your changes can fit into the description of your existing FCC Form 470 – and you attached at least one RFP document to your original form – you can add one or more RFP documents to provide information about the change(s) you want to make. However, if your changes are significant, you must restart your 28-day clock. You must count out the 28 days yourself, because we will not know if your new document contains a cardinal change or simply a clarification.”



CARDINAL CHANGES (2/2)

- The FCC and USAC don't provide a comprehensive list of what changes are considered to be cardinal, but **the following will likely require the applicant to file a new Form 470 and/or restart the 28 calendar day bidding clock:**
 - **Adding a Category of Service, Type of Service, or Function** that was not listed on the original 470 and/or RFP document
 - **Adding more library branches as recipients of service**
 - **Substantially changing the quantity requested**
 - Buying 3 access points instead of 2 or 800 feet of cabling instead of 600 feet should be fine; doubling or tripling quantities may be a problem
- Litmus test: Would these changes significantly alter how vendors respond (or whether they respond at all)?
- **Best practice: When in doubt—file a new Form 470**



STATE BIDDING RULES

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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 **\$30,000 (updated—amount raised effective June 27, 2019)**. A notice must be given in a newspaper or 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 lowest evaluated bid price. (See [KRS 45A.365](#))
 - The Form 470 and RFPs are automatically posted in an online database accessible to the public.

KRS 424.260(1)

- If your library doesn't follow the Model Procurement Code, then purchases over **\$30,000** must be bid per [KRS 424.260\(1\)](#) – **amount raised effective June 27, 2019.**
 - Must also advertise the bid per [KRS 424.130](#)
 - 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:** The Kentucky Model Procurement Code (Kentucky Revised Statutes 45A.345-.460) requires bids for contracts and purchases over \$30,000. See <https://legislature.ky.gov/Law/Statutes/Pages/default.aspx> for more information.
 - **For non-MPC libraries:** Kentucky Revised Statute 424.260(1) requires bids for contracts and purchases over \$30,000. See <https://legislature.ky.gov/Law/Statutes/Pages/default.aspx> for more information.



Ready
Set
Let's Get Our Feet Wet

EXAMPLE RFPS FOR CATEGORY TWO

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EXAMPLE RFPS

These example RFPS can be downloaded at the end of the presentation or accessed from the [Form 470 Competitive Bidding Examples section](#) of the KDLA website

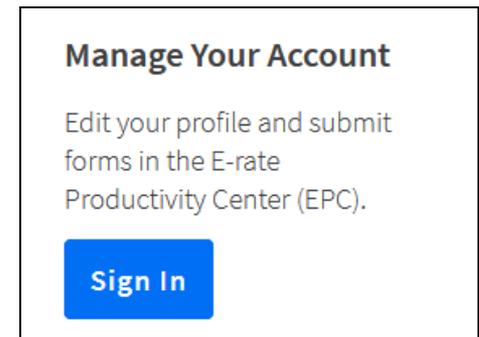
- **Internal Connections – Cabling & Network Upgrades**
 - [Example #1](#): For upgrades likely to total \$30,000 or more – includes language about sealed bidding per the Kentucky Model Procurement Code
 - [Example #2](#): For upgrades like to total less than \$30,000 – does not include language about Model Procurement
 - **See Form 470 service request examples – [slides 69-73](#)**
- **Basic Maintenance of Internal Connections**
 - [Example #3](#): Seeking a vendor to perform routine maintenance on equipment owned by the library
 - **See Form 470 service request examples – [slides 74-78](#)**
- **Managed Internal Broadband Services (MIBS) or Basic Maintenance of Internal Connections (BMIC)**
 - [Example #4](#): Seeking a vendor to perform a service that may involve maintenance or monitoring of the library's eligible networking equipment; bid for both because these services are similar (covering your rear for the Form 471 application!)
 - **See Form 470 service request examples – [slides 79-81](#)**

E-RATE PRODUCTIVITY CENTER: UPDATING LIBRARY PROFILES

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E-RATE PRODUCTIVITY CENTER

- To set up 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 portal.usac.org
 - Go to main USAC website for Schools and Libraries (<https://www.usac.org/e-rate/>). The Manage Your Account is on the left side of the page, and the blue Sign In button links to the EPC login page – **updated link + screen cap**



UPDATING PROFILES

News Tasks (1) Records **Reports** Actions 

My Applicant Landing Page

 Training
Universal Service Administrative Co.

Welcome, [Pioneer County Public Library System!](#)

[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](#)

Notifications

Notification Type

Funding Year

Status All

Notification	Description	Issued Date
No items available		

My Entities

Entity	Entity Number			
Pioneer County Public Library System	208			
Loganville Branch Library	209	Loganville	KY	41800
Pioneer County Public Library Main Branch	210	Boonesburg	KY	41700
Pioneer County Bookmobile	211	Boonesburg	KY	41700

To update the address, phone, square footage, or other information about your system or its branches, go to My Applicant Landing Page and click on the library system or branch name under My Entities.

UPDATING LIBRARY SYSTEM PROFILE

News Tasks (1) **Records** Reports Actions

Records / Applicant Entities

#208 - Pioneer County Public Library System

Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms FRN Appeals News **Related Actions**

- Create a New User**
This function allows you to create a user for your entity.
- Add or Remove Existing Users**
This process allows user to add and remove users from an organization
- Manage User Permissions**
This function allows you manage the permissions for one or more users.
- Manage Organization**
This function allows you to update information about an entity or PEV.
- Modify Account Administrator**
This process allows you to transfer the Account Administrator function to an
- Create a Customer Service Case**
This function allows you to submit a question about an E-rate form or topic, submit a specific request or an attachment.
- Manage General Contact**
This function allows you to designate the general contact for your entity.
- Manage Organization Relationships**
Process to relate an Organization to another Organization
- Create FCC Form 470**
This function allows you to create an FCC Form 470 for your entity.
- Create FCC Form 471**
This function allows you to create an FCC Form 471 for your entity.

FOR LIBRARY SYSTEM PROFILES: After following the profile link from My Applicant Landing Page, click on Related Actions from the horizontal menu near the top of the page. Select Manage Organization to open & modify the library system profile information.

UPDATING BRANCH PROFILES

Records / Applicant Entities

#210 - Pioneer County Public Library Main Branch

[MANAGE ORGANIZATION](#) [MANAGE ANNEXES](#)

Summary Modifications Additional Information Category Two Budget Contracts FCC Forms News Related Actions

Organization Details

Name Pioneer County Public Library Main Branch
Entity Number 210
FCC Registration Number

Contact Information

Physical Address 100 Main Street
Boonesburg, KY 41700
Mailing Address 100 Main Street
Boonesburg, KY 41700

Applicant Attributes

Latitude	Not Found	User-Entered Latitude	
Longitude	Not Found	User-Entered Longitude	
Urban/Rural Status	Not Found	User-Entered Urban/Rural Status	Rural
Library Sub-Type	<input checked="" type="checkbox"/> Public Library <input type="checkbox"/> Private Library <input type="checkbox"/> Academic <input type="checkbox"/> Research <input type="checkbox"/> Tribal Library	Is this library part of a library system?	Yes
		Square Footage	16000

FOR INDIVIDUAL BRANCH PROFILES: After following the link from My Applicant Landing Page, click on the Manage Organization button to modify the entity's profile. Alternative: click on Related Actions in the horizontal menu, then click on Manage Organization.

FORM 470 – BASIC INFORMATION

[Return to Presentation
Contents](#)

START OR CONTINUE A FORM 470

Continue working on an in-process Form 470 under Tasks

Click FCC Form 470 to start a new form

Alternative: start a Form 470 by clicking on the library system name to open the profile, then Related Actions tab, then Create FCC Form 470 link

News **Tasks (1)** Recd

My Applicant

Training

Universal Service Administrative Co.

Welcome **Pioneer County Public Library System!**

Notifications

Notification Type *Please select a value*

Funding Year *-- Select a Funding Year --*

Status All
 Generated
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

My Entities

Entity	Issued Date	Generated By	Generated On
Pioneer County Public Library System			
Loganville Branch Library	209	Loganville	KY 41800
Pioneer County Public Library Main Branch	210	Boonesburg	KY 41700
Pioneer County Bookmobile	211	Boonesburg	KY 41700

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

FORM 470 – NAVIGATION

The screenshot shows the Appian interface for managing FCC Form 470. The top navigation bar includes 'News', 'Tasks', 'Records', 'Reports', and 'Actions'. The 'Tasks' menu item is circled in green, with a callout box stating: "Continue working on an in-process Form 470 under Tasks. EPC saves your location & entries in the form." The main content area displays "FCC Form 470 - Pioneer County Pub" and "Bidding - Form #200000125". Below this, there are tabs for "Basic Information", "Service Requests", "Technical Contact Information", "Procurement Information", "FCC Form 470 Review", and "Certifications & Signature". A paragraph of text explains that information is pre-filled from the applicant's profile and can be updated. A section titled "Application Type and Recipients of Service" shows "Applicant Type: Library System". At the bottom, four buttons are highlighted with callout boxes: "BACK" (blue box), "DISCARD FORM" (red box), "SAVE & SHARE" (purple box), and "SAVE & CONTINUE" (yellow box). The "DISCARD FORM" button is circled in red.

Tasks

FCC Form 470 - Pioneer County Pub

Bidding - Form #200000125

Last Saved: 11/6/2019 3:06 PM EST

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

Where applicable, we've completed this section of the form based on information from your applicant entity's profile. If any of the non-editable information is incorrect, or you wish to change the information, please update your profile first by going to your entity record, and clicking Manage Organization from the Related Actions menu. If you do not have access to Manage Organization, please contact your applicant entity's account administrator or create a customer service case to request updates to your applicant entity's profile.

Application Type and Recipients of Service

Applicant Type: Library System

Entities: 3

Use Back button to return to a previous page

Discard Form – Permanently delete forms you're working on.

Save & Share – Careful – think of this as passing the baton. Sharing an in-process form with another EPC user in your library system will remove it from your Tasks list. That user has to 'share' the form back to you!

Save & Continue to go to next page

BACK **DISCARD FORM** **SAVE & SHARE** **SAVE & CONTINUE**

FORM 470 – BASIC INFORMATION (1/3)

FCC Form 470 - Funding Year 2020

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

> FCC Notice Required By The Paperwork Reduction Act (OMB Control Number: 3060-0806)

▼ Billed Entity Information

Pioneer County Public Library System	Billed Entity Number: 208
100 Main Street	FCC Registration Number: 0123456789
Boonesburg, KY 41700	
111-222-3333	
library.system10.user1@mailinator.com	

Your library system's Billed Entity Information will be pulled from its EPC profile.

Application Nickname

Please enter an application nickname here. *

DISCARD FORM

Enter a nickname that will be easy to find on your Tasks list or when sorting through your library's completed forms.

SAVE & SHARE

SAVE & CONTINUE

Save & Continue to go to next page

FORM 470 – BASIC INFORMATION (2/3)

FCC Form 470 - Funding Year 2020

Pioneer County Public Library System - Funding Year 2020 Category Two Bidding - Form #200000125

Last Saved: 11/6/2019 3:10 PM EST

Basic Information

Service Requests

Where applicable, we've completed this section of the form based on your organization's profile. If you wish to change the information, please update your profile. If you do not have access to Manage Organization, please contact your administrator. If you are the administrator, please update your applicant entity's profile.

The Number of Eligible Entities should include your main library and other branches that have been assigned entity numbers (including kiosks and bookmobiles).

Application Type and Recipients of Service

Applicant Type: Library System

Number of Eligible Entities: 3

- Recipient(s) of Service
- Public Library
 - Bookmobile
 - Main Branch
 - Public Library System

Recipients of Service

Billed Entity Name	Billed Entity Number
Pioneer County Public Library System	208

Only the name and BEN for the library system will be listed here because it handles billing for all the branches.

BACK

DIS

SAVE & SHARE

SAVE & CONTINUE

FORM 470 – BASIC INFORMATION (3/3)

FCC Form 470 - Funding Year 2020

Pioneer County Public Library System - Funding Year 2020 Category Two Bidding - Form #200000125

Last Saved: 11/6/2019 3:09 PM EST

Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

Next, you will identify the individuals assisting in seeking E-rate support.

Consultant Information

There are currently no consulting firms associated with your library.

If you select Yes, your contact info will automatically appear. If you select No, you can search for other users with EPC accounts associated with your library.

Contact Information

Are you the main contact person?

YES ✓

NO

Lauren Abner

library.system10.user1@mailinator.com

502-564-1728

BACK

DISCARD FORM

SAVE & SHARE

SAVE & CONTINUE

FORM 470 – CATEGORY OF SERVICE + RFP DOCUMENTS

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Contents](#)

CATEGORY(S) OF SERVICE

FCC Form 470 - Funding Year 2020

Pioneer County Public Library System - Funding Year 2020 Category Two Bidding - Form #200000125

Last Saved: 11/6/2019 3:11 PM EST

Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

Next, you will identify the category(s) of service requested.

Visit [our website](#) for more information on how to file the FCC Form 470.

Category(s) of Service

What are the category(s) of service that you are requesting?

CATEGORY 1

- Data Transmission and/or Internet Access

CATEGORY 2 ✓

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

BAC

Select which Categories of Service you want to request on this form. For the Form 470, you can file separate forms for each or file for both Categories on the same form—your choice.

SAVE & SHARE

SAVE & CONTINUE

UPLOADING RFPs (1/2)

Basic Information

Service Requests

Technical Contact
Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

If you are using RFPs for any of the requested services, start by uploading them all first.

RFPs for Service Requests

Is there a RFP for any of the services you are requesting?

YES ✓

NO

You must answer the RFP question to move forward; if you indicate Yes, options for uploading files will appear.

Upload button allows you to select documents from your computer. Most file formats, including zip files, are accepted. **Note: EPC may not allow certain special characters such as hyphens in the file name.**

Please upload all RFPs for the services you are requesting. ?



Example RFP 1 FY2020 Category Two Internal Connectio...
DOCX – 30.6 KB



Example RFP 3 FY2020 Category Two Basic Maintenance ...
DOCX – 31.37 KB



Example RFP 4 FY2020 Category Two Managed Internal B...
DOCX – 31.68 KB

UPLOAD



Drop file here

You must upload your actual RFP document. Uploading a document with a hyperlink to another website, including bid management sites, is not sufficient and can lead to funding denial.

SAVE & SHARE

SAVE & CONTINUE

To remove an RFP document, hover over the document icon

and click when it turns into an X

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 category.

RFPs for Service Requests

If applicable, please select the RFP(s) that apply to all new category TWO services.

- Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
- Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections
- Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS

This selection will only apply to new service requests. Selecting and deselecting RFPs above will not affect service requests already added to this FCC Form 470.

BACK

DISCARD FORM

If you upload RFPs, you can automatically attach the RFP to all requests in the selected Category of Service.

SAVE & SHARE

SAVE & CONTINUE

FORM 470 – EXAMPLE SERVICE REQUESTS

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CONTENTS & COLOR-CODING FOR EXAMPLE SERVICE REQUESTS

- **General Notes on Adding Service Requests, Editing/Removing Service Requests, Narrative Field – [slides 66-68](#)**
- **Internal Connections – Cabling & Network Upgrades – [slides 69-73](#)**
 - How to Match Service Requests with Example RFPs #1 or #2 – [slide 69](#)
 - Service Request Example – Internal Connections: Cabling – [slides 70-71](#)
 - Service Request Example – Internal Connections: Access Points & Licenses – [slides 72-73](#)
- **Basic Maintenance of Internal Connections (BMIC) – [slides 74-78](#)**
 - How to Match Service Requests with Example RFPs #1, #2, or #3 – [slide 74](#)
 - Service Request Example – BMIC for Cabling – [slides 75-76](#)
 - Service Request Example – BMIC for Access Points – [slides 77-78](#)
- **Managed Internal Broadband Services (MIBS) or Basic Maintenance of Internal Connections (BMIC) – [slides 79-81](#)**
 - Why to File for Both Service Types – [slide 79](#)
 - Service Request Example – MIBS for Existing Equipment – [slide 80](#)
 - Service Request Example – BMIC for Firewall – [slides 81](#)

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Presentation
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ADDING SERVICE REQUESTS

FCC Form 470 - Funding Year 2020

Pioneer County Public Library System - Funding Year 2020 Category Two Bidding - Form #200000125

Last Saved: 11/6/2019 4:40 PM EST

Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

Next, you will describe the services you are requesting.

Service Requests: Category Two

There are currently no Category Two service requests. Please enter the service requests below by selecting 'Add New Service Request'

ADD NEW SERVICE REQUEST

EDIT SERVICE REQUEST

REMOVE SERVICE REQUEST

Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such information include, but are not limited to, capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualifications.

Use this button to add each service request.

BACK

DISCARD FORM

SAVE & SHARE

SAVE & CONTINUE

EDIT OR REMOVE SERVICE REQUESTS

Service Requests: Category Two

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

<input type="checkbox"/>	Service Type	Function	Manufacturer	Manufacturer Other Description	Entities	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs
<input type="checkbox"/>	Internal Connections	Cabling	No Preference						Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
<input checked="" type="checkbox"/>	Internal Connections	WAP	Meraki or equivalent						Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
<input type="checkbox"/>	Basic Maintenance of Internal Connections	Cabling	No Preference		1	5000	Feet		Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
<input type="checkbox"/>	Basic Maintenance of Internal Connections	WAP	Meraki		1	2	Each		Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language

To edit or remove a service request, check the box in the far left column. You can edit/remove only 1 service request at a time.

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 FIELD

Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

Please see the [RFP](#) documents for all details of Pioneer County Public Library's requests.

BACK

DISCARD FORM

SAVE & SHARE

SAVE & CONTINUE

For the examples in this section, the narrative field directs vendors to the RFP documents for full details. See [next section](#) for more information about writing narratives for the Form 470.

INTERNAL CONNECTIONS – CABLING & NETWORK UPGRADES

How to Match Service Requests with Example RFPs #1 or #2

RFP request	470 Service Type	Function
Cat 6 cabling	Internal Connections	Cabling
RJ45 jacks, face plates, surface mount boxes, patch panels, J hooks, patch cables, any other fasteners/connectors for cabling installation	Internal Connections	Antenna, Connectors, and Related Components
Removal of old cabling	n/a – mentioning in RFP or 470 narrative is sufficient	
Installation of new cabling	n/a – check option on Internal Connections service requests for seeking Installation, Activation, and Initial Configuration	
Access Points and Licenses	Internal Connections	WAP
Firewall and Licenses	Internal Connections	Firewall Services and Components
Uninterruptible Power Supply/Battery Backup	Internal Connections	UPS/battery backup
Switch	Internal Connections	Switches

When requesting bids for equipment under Internal Connections, also add the same Functions as requests for Basic Maintenance of Internal Connections to cover manufacturer technical support packages that may be included in the bid - especially for firewalls.

SERVICE REQUEST EXAMPLE – INTERNAL CONNECTIONS: CABLING (1/2)

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

Next, you will describe the services you are requesting.

Add New Service Request

Service Type *

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

Function *

Cabling

Quantity

5000

Unit

Feet

First, select the Service Type. Pieces of equipment, licenses, and cabling are Internal Connections. Then select the Function (cabling, switch, firewall, access point, etc.). Licenses/software are bid under the same Function as the equipment.

Pay attention to the Unit when entering Quantity. Cabling service requests will ask for the Quantity in linear feet, but other requests use 'Each' as the unit.

Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with
el Procurement language

Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections

Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS

SERVICE REQUEST EXAMPLE – INTERNAL CONNECTIONS: CABLING (2/2)

Unless 'No Preference' is indicated, Internal Connections requests automatically include the phrase 'or equivalent' when a particular manufacturer (brand) is indicated due to E-rate bidding rules.

Number of entities served = number of branches using this equipment or service

Check this if your library wants a vendor to install the equipment being requested.

Make sure the appropriate box is checked if this request appears in an RFP document.

Manufacturer

No Preference

Number of entities served?

1

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.

Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language

Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections

Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS

ADD

Click on Add once all fields have been entered.

SERVICE REQUEST EXAMPLE – INTERNAL CONNECTIONS: ACCESS POINTS & LICENSES (1/2)

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

Next, you will describe the services you are requesting.

Add New Service Request

Service Type *

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

Function *

WAP

Quantity *

2

Unit

Each

CANCEL **ADD**

First, select the Service Type. Pieces of equipment, licenses, and cabling are Internal Connections. Select the Function (cabling, switch, firewall, access point, etc.). Licenses/software are bid under the same Function as the equipment.

Pay attention to the Unit when entering Quantity. Most Internal Connections service requests use 'Each' as the unit.

SERVICE REQUEST EXAMPLE – INTERNAL CONNECTIONS: ACCESS POINTS & LICENSES (2/2)

Unless 'No Preference' is selected, Internal Connections requests automatically include the phrase 'or equivalent' when a particular manufacturer (brand) is indicated due to E-rate bidding rules. **The phrase 'or equivalent' should also be included in the RFP and/or Form 470 narrative.**

Check this if your library wants a vendor to install the equipment being requested.

Make sure the appropriate box is checked if this request appears in an RFP document.

Manufacturer

Meraki or equivalent

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.

Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language

Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections

Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS

ADD

Click on Add once all fields have been entered.

BASIC MAINTENANCE OF INTERNAL CONNECTIONS

How to Match Service Requests with Example RFPs #1, #2, or #3

RFP request	470 Service Type	Function
Cat 6 cabling	Basic Maintenance of Internal Connections	Cabling
RJ45 jacks, face plates, surface mount boxes, patch panels, J hooks, patch cables, any other fasteners/connectors for cabling installation	Basic Maintenance of Internal Connections	Antenna, Connectors, and Related Components
Access Points	Basic Maintenance of Internal Connections	WAP
Firewall	Basic Maintenance of Internal Connections	Firewall Services and Components
Uninterruptible Power Supply/Battery Backup	Basic Maintenance of Internal Connections	UPS/battery backup
Switch	Basic Maintenance of Internal Connections	Switches

When requesting bids for equipment under Internal Connections (RFP examples #1 and #2), also add the same Functions as requests for Basic Maintenance of Internal Connections to cover manufacturer technical support packages that may be included in the bid - especially for firewalls. For contracts/agreements to perform maintenance on a regular basis (RFP example #3), list service requests for each piece of E-rate eligible equipment to be maintained.

SERVICE REQUEST EXAMPLE – BMIC FOR CABLING (1/2)

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

Next, you will describe the services you are requesting.

Add New Service Request

Service Type *

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

Function *

Cabling

Quantity

5000

Unit

Feet

Best Practice: Add a service request for Basic Maintenance for any Internal Connections equipment or cabling the library requests to ensure eligibility for optional technical support packages offered by vendors. If you don't end up purchasing a BMIC service later, no big deal.

Pay attention to the Unit when entering Quantity. Cabling service requests will ask for the Quantity in linear feet, but other requests use 'Each' as the unit.

SERVICE REQUEST EXAMPLE – BMIC FOR CABLING (2/2)

Unless you select 'No Preference' for the manufacturer/brand, the specific manufacturer will be listed *without* the phrase 'or equivalent' because the library is requesting service on Category Two equipment it already owns or intends to purchase. You can provide more specifics about what your library owns or needs in the Narrative field or RFP document.

Number of entities served = number of branches using this equipment or service

Make sure the appropriate box is checked if this request appears in an RFP document.

Manufacturer
No Preference

Number of entities served?
1

Please select the RFP(s) that apply to this service request.

- Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
- Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections
- Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS

Click on Add once all fields have been entered.

ADD

SERVICE REQUEST EXAMPLE – BMIC FOR ACCESS POINTS (1/2)

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

Next, you will describe the services you are requesting.

Add New Service Request

Service Type *

Internal Connections

Basic Maintenance of Internal Connections

Managed Internal Broadband Services

Function *

WAP

Quantity

2

Unit

Each

CANCEL **ADD**

Best Practice: Add a service request for Basic Maintenance for any Internal Connections equipment or cabling the library requests to ensure eligibility for optional technical support packages offered by vendors. If you don't end up purchasing a BMIC service later, no big deal.

Pay attention to the Unit when entering Quantity.

SERVICE REQUEST EXAMPLE – BMIC FOR ACCESS POINTS (2/2)

Unless you select 'No Preference' for the manufacturer/brand, the specific manufacturer will be listed *without* the phrase 'or equivalent'. This may be because your library is requesting service on Category Two equipment the library already owns or intends to purchase. You can provide more specifics about what your library owns or needs in the Narrative field or RFP document.

Number of entities served = number of branches using this equipment or service

Make sure the appropriate box is checked if this request appears in an RFP document.

Manufacturer
No Preference

Number of entities served?
1

Please select the RFP(s) that apply to this service request.

- Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
- Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections
- Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS

Click on Add once all fields have been entered.

ADD

MANAGED INTERNAL BROADBAND SERVICES (MIBS) OR BASIC MAINTENANCE OF INTERNAL CONNECTIONS (BMIC)

Why to File for Both Service Types:

For services such as managed Wi-Fi where the vendor remotely monitors/maintains the library's E-rate eligible networking equipment, it's sometimes difficult to determine if their service is MIBS or BMIC. You should therefore add service requests under both Service Types to ensure that either option can be listed on the Form 471 application for discounts.

- **Managed Internal Broadband Services (MIBS)** – add 1 request that lists the number of E-rate eligible pieces of equipment to be monitored/maintained; the 470 narrative or RFP document must specify the make/model of equipment
- **Basic Maintenance of Internal Connections (BMIC)** – add service requests to cover each function of E-rate eligible equipment to be monitored/maintained

SERVICE REQUEST EXAMPLE – MIBS FOR EXISTING EQUIPMENT

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

Next, you will describe the services you are requesting.

Add New Service Request

Service Type *

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

Function *

Existing Equipment

Number of entities served? *

1

Please select the RFP(s) that apply to this service request.

- Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
- Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections
- Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS

ADD

Number of entities served = number of branches using this equipment or service

Make sure the appropriate box is checked if this request appears in an RFP document.

Click on Add once all fields have been entered.

For Managed Internal Broadband Services (ex: Managed Wi-Fi), the Function is either Leased Equipment or Existing Equipment. For Existing Equipment already owned by the library, the Form 470 narrative or RFP document must specify the brand and model number of equipment, and the contract or agreement for the winning vendor must reference this specific equipment information, as well.

SERVICE REQUEST EXAMPLE – BMIC FOR FIREWALL

Number of entities served = number of branches using this equipment or service

Enter the preferred manufacturer/brand for the equipment or select 'No Preference'.

Next, you will describe the services you are requesting.

Add New Service Request

Service Type *

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

Function *

Firewall Service and Components

Quantity

1

Unit

Each

Manufacturer

SonicWALL

Number of entities served?

1

Please select the RFP(s) that apply to this service request.

- Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
- Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections
- Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS

Best Practice: Add a service request for Basic Maintenance (BMIC) for any piece of equipment on which your library also seeks bids for Managed Internal Broadband Services (MIBS) to ensure eligibility for the service your library selects.

Make sure the appropriate box is checked if this request appears in an RFP document.

ADD

Click on Add once all fields have been entered.

FORM 470 – CRAFTING A CAT2 NARRATIVE

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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 helps KDLA's Technology Consultant 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 CAT2 NARRATIVE (1/2)

- NOT an exhaustive list:
 - **Describing your library system** – A potential service provider may not take the time to research every name/location of buildings in your library system because EPC doesn't make that easy. Putting the names & addresses of branches in the narrative makes it easier for them to look up whether those branches are in their service area.
 - **Dates** – When does your library need the equipment? Does the library want early Category Two installation (April 1, 2020 to June 30, 2020)?
 - **Internet speeds** – Are you upping your bandwidth and need equipment that can handle a certain throughput?

WHAT TO INCLUDE IN CAT2 NARRATIVE (2/2)

- NOT an exhaustive list (continued):
 - **Bidding** – Do you have any specifics about how you want bids to be submitted or formatted?
 - **Compatible equipment** – If you're requesting Category Two products/services, do they need to be compatible with items your library already owns? What other specs are important?
 - **Disqualification factors** – Does the service provider have a Service Provider Identification Number (SPIN/Form 498 ID)?
 - Disqualification factors must be clearly listed in the Form 470 or RFP and must be binary (Yes or No answers)
 - See the [2/16/18 School & Libraries News Brief](#) for more on disqualification factors

EXAMPLE NARRATIVE – INTERNAL CONNECTIONS

Narrative for Category Two – Internal Connections

The Pioneer County Public Library Main Branch located at 100 Main Street, Boonesburg, KY 41700 needs:

+/- 500 feet of Cat6 cabling

+/- 20 three-foot patch cables

+/- 1 (one) 48-port PoE switch and license (if license needed)

Installation of the switch, cabling, and patch cables proposed by the vendor

All cost proposals must reflect any discounts available to governmental units. Each line item on the proposal should clearly list quantity, manufacturer, part number, description, unit price, and extended price.

Disqualification factors: proposals MUST include the SPIN/Form 498 ID and MUST separate services by line item. Additional points on bid evaluation will be given to vendors that offer Service Provider Invoicing (SPI/Form 473).

FORM 470 – TECH CONTACT & STATE/LOCAL PROCUREMENT

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TECHNICAL CONTACT PERSON

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

Next, please name the person on your staff or project who can provide additional technical details or answer specific questions from service providers about the services you are seeking.

Technical Contact Person

Is there a person who can provide additional technical details or answer specific questions from service providers about the services you are seeking?

YES ✓ NO

How would you like to enter the technical contact details?

SEARCH EPC SYSTEM **ENTER DETAILS MANUALLY ✓**

First Name *

Charlie

Last Name *

Dickens

Title

IT Coordinator

Phone Number *

555-555-5555

Phone Number Extension

55

Email *

dickensianIT@mailinator.com

Re-enter Email *

dickensianIT@mailinator.com

If needed, add a **Technical Contact** who can best answer specific questions about your network and/or your needs. It can be a user in EPC or someone you enter manually.

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

CONTINUE

STATE OR LOCAL PROCUREMENT REQUIREMENTS

Basic Information Service Requests Technical Contact Information

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

State or Local Procurement Requirements

Are there state or local procurement/competitive bidding requirements to be followed?

YES ✓ NO

If applicable, 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: The Kentucky Model Procurement Code (Kentucky Revised Statutes 45A.345-.460) requires bids for contracts and purchases over \$30,000. See <https://legislature.ky.gov/Law/Statutes/Pages/default.aspx> for more information.

FOR LIBRARIES THAT DIDN'T ADOPT THE MODEL PROCUREMENT CODE: Kentucky Revised Statute 424.260(1) requires bids for contracts and purchases over \$30,000. See <https://legislature.ky.gov/Law/Statutes/Pages/default.aspx> for more information.

For procurement over \$30,000, cite Kentucky Revised Statutes. Reminder: Your library must receive sealed competitive bids to be opened at a specified date/time & location for procurement over \$30,000.

Click on Review FCC Form 470 to start generating a draft PDF copy of the form—suitable for sharing with the KDLA Technology Consultant!

FORM 470 – REVIEW AND CERTIFICATION

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REVIEW YOUR FORM 470

News **Tasks (1)** Records Reports Actions

FCC Form 470 - Funding Year 2020

Pioneer County Public Library System - Funding Year 2020 Category Two Bidding

Last Saved: 11/6/2019 10:33 PM EST

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

When the FCC Form 470 PDF is ready, a task will become available to complete certification.

News **Tasks (1)** Records Reports Actions

Click here to send a task...

Assigned to Me >
Sent by Me
Starred ★

Me
Certify FCC Form 470 - 200000125 - Funding Year 2020 Category Two Bidding
A moment ago ☆

DOWNLOAD DRAFT PDF COPY

 SAVE DRAFT

FCC Form 470 - Funding Year 2020

**Pioneer County Public Library System - Funding Year
#200000125**

Last Saved: 11/6/2019 10:33 PM EST

Basic Information

Service Requests

Technical Contact
Information

Pro
Information

Signature

Please download and carefully review this FCC Form 470 before certifying.

Download Document Link

[USAC_FCC_FORM_470_APPLICATION_200000125_DRAFT](#)

By checking this box, I certify that the information in the PDF document above is correct.

BACK

SEND FOR CERTIFICATION

CONTINUE TO CERTIFICATION

Click on the blue Download Document Link. This will open another browser tab where you can choose to open or save the PDF.

EMAIL THE DRAFT TO KDLA

DRAFT



Universal Service
Administrative Co.

FCC Form 470 – Funding Year 2020
Form 470 Application Number: 200000125
Funding Year 2020 Category Two Bidding

Billed Entity

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

Contact Information

Lauren Abner
library.system10.user1@mailinator.com
502-564-1728

Billed Entity Number: 208
FCC Registration Number: 0123456789

Application Type

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

Number of Eligible Entities: 3

Consulting Firms

Name	Consultant Registration Number	Phone Number	Email

Consultants

Name	Phone Number	Email

RFPs

Id	Name
329142	Example RFP 1 FY2020 Category Two Internal Connections Sealed Bidding with Model Procurement language
329144	Example RFP 4 FY2020 Category Two Managed Internal Broadband Services MIBS
329143	Example RFP 3 FY2020 Category Two Basic Maintenance of Internal Connections

Category One Service Request

Service Type	Function	Function Other Description	Minimum Capacity	Maximum Capacity	Exhibits	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs

Description of Other Functions

Id	Name

Narrative

Category Two Service Request

Service Type	Function	Manufacturer Description	Manufacturer Other Description	Exhibits	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs
Internal Connections	Cabling	No Pedestal		1	3000	Foot	Yes	3291-G
Internal Connections	WAP	Model or equivalent		2	Each	Yes	3291-G	

DRAFT

Draft 470s and RFP documents can be emailed to lauren.abner@ky.gov for review.

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 2020

Pioneer County Public Library System - Funding Year 2020 Category Two Bidding - Form #200000125

Last Saved: 11/6/2019 10:33 PM EST

Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

Please download and carefully review this FCC Form 470 before certifying.

Download Document Link

[HSAC_FCC_FORM_470_APPLICATION_200000125_DRAFT](#)

By checking this box, I certify that the information in the PDF document above is correct.

Buttons

SEND FOR CERTIFICATION

CONTINUE TO CERTIFICATION

After the draft copy has been reviewed, check this box and click on the blue Continue to Certification button. If you want to send the form to another full-rights user for certification, select Send for Certification.

YES TO PROCEED

SAVE DRAFT

FCC Form 470 - Fur

Pioneer County Public Li
#200000125

Last Saved: 11/6/2019 10:33 PM EST

This function will send you directly to certification for your FCC Form 470. Do you wish to proceed?

Two Bidding - Form

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

Please do
Download
USAC_FCC

By checking this box, I certify that the information in the PDF document above is correct.

Confirm that you want to proceed directly to certification.

CERTIFY THE FORM

Certify FCC Form 470

Pioneer County Public Library System - Funding Year 2020 Category Two Bidding - Form #200000125

Last Saved: 11/6/2019 10:33 PM EST

Basic Information	Service Requests	Technical Contact Information	Procurement	Signature				
<p>Please complete the certifications below.</p> <h4>Applicant Certifications</h4> <ul style="list-style-type: none"><input checked="" type="checkbox"/> I certify that the applicant includes libraries or library consortia eligible for assistance from the Technology Act of 1996 that do not operate as for-profit businesses and whose budgets are not primarily for elementary and secondary schools, colleges, and universities). <h4>Other Certifications</h4> <ul style="list-style-type: none"><input checked="" type="checkbox"/> I certify that this FCC Form 470 and any applicable RFP will be available for review by potential bidders selecting a service provider. I certify that all bids submitted will be carefully considered and the most offering, with price being the primary factor, and will be the most cost-effective means of procurement.<input checked="" type="checkbox"/> I certify that I will retain required documents for a period of at least 10 years (or whatever retention period is required by the rules in effect at the time of this certification) after the later of the last day of the applicable funding year or the service delivery deadline for the associated funding request. I certify that I will retain all documents necessary to demonstrate compliance with the statute and Commission rules regarding the form for, receipt of, and delivery of services receiving schools and libraries discounts. I acknowledge that I may be audited pursuant to participation in the schools and libraries program.<input checked="" type="checkbox"/> I certify that I have reviewed all applicable FCC, state, and local procurement/competitive bidding requirements and that I have complied with them. I acknowledge that persons willfully making false statements on this form may be punished by fine or forfeiture, under the Communications Act, 47 U.S.C. §§ 502, 503(b), or fine or imprisonment under Title 18 of the United States Code, 18 U.S.C. § 1001.<input checked="" type="checkbox"/> I acknowledge that FCC rules provide that persons who have been convicted of criminal violations or held civilly liable for certain acts arising from their participation in the schools and libraries support mechanism are subject to suspension and debarment from the program.<input checked="" type="checkbox"/> I certify that the services the applicant purchases at discounts provided by 47 U.S.C. § 254 will be used primarily for educational purposes, see 47 C.F.R. § 54.500, and will not be sold, resold or transferred in consideration for money or any other thing of value, except as permitted by the Commission's rules at 47 C.F.R. § 54.513. Additionally,					<div style="background-color: yellow; border: 2px solid black; padding: 10px; text-align: center;"><p>You must agree to all of the certifications to post the Form 470. All the certifications are straightforward – no ‘trick’ certifications!</p></div>			

BACK TO LANDING PAGE

The screenshot shows the Appian interface with the 'Tasks' tab selected. The top navigation bar includes 'News', 'Tasks', 'Records', 'Reports', and 'Actions'. The user's profile is 'Appian'. On the left sidebar, the 'Training' logo for 'Universal Service Administrative Co.' is circled in yellow. Below it are filters for 'Assigned to Me', 'Sent by Me', 'Starred', 'STATUS' (Open), and 'DEADLINE' (Overdue, Today, Within 7 days). The main content area has a search box 'Click here to send a task...', a 'NEWEST' dropdown, and a message 'No tasks available'. A yellow callout box with a pointer to the USAC logo contains the text: 'After you certify, you'll see the Tasks list again. You likely won't have any additional tasks. Click on the USAC logo to return to My Applicant Landing Page.'

VIEW YOUR CERTIFIED FORM



Your in-process and certified Forms 470 are listed at the bottom of My Applicant Landing Page. Form Type drop-down: select FCC Form 470. Funding Year drop-down: select 2020. In the far left column, click on the nickname to view the form.

▼ FCC Forms and Post-Commitment Requests

- FCC Forms
- Post-Commitment Requests

Form Type

Funding Year

- Status All
- Incomplete
 - Certified

Nickname	Application Number	Funding Year	Status
Funding Year 2020 Category Two Bidding	200000125	2020	Certified

PRINT YOUR FORM 470

Records / FCC Forms 470

Funding Year 2020 Category Two Bidding - #200000125



Summary

Generated Documents

News

Related Actions

After following the link to your Form 470 from My Applicant Landing Page, click on the Generated Documents tab near the top of the page.

Generated FCC Forms 470

FCC Form 470 Version

Original Version

The Original Version link opens a PDF copy of the form as it appeared when you certified it. If you have to 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

Funding Year 2020 Category Two

Summary

Generated Documents

News

Related Actions

Please note: The following fields pull the most current data from the Contract Name, and Contact Phone Number. If you would like to review this FCC Form 470 Generated Documents related dashboard on the left-hand side and click

Application Information

Nickname Funding Year 2020 Category Two Bidding

Application Number 200000125

Funding Year 2020

Status Certified

Allowable Contract Date 12/4/2019

The Summary tab for your Form 470 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 different depending on what you specified in RFPs or whether your RFPs were posted in other places on later dates—that would restart the 28-day competitive bidding clock.**

Certified By Lauren Abner

Last Modified Date 11/6/2019 10:42 PM EST

Last Modified By Lauren Abner

USAC EMAIL FOR ALLOWABLE CONTRACT DATE

From: EPC Send Allowable Contract Notification <processmodel348@portal.usac.org>
To: [REDACTED]
Cc:
Subject: EPC Notification: Allowable Contract Date Reached for FCC Form 470 # 160001745

Message |  Selecting Service Providers.pdf (200 KB)



A PDF with instructions on vendor selection will be attached.



Hello,

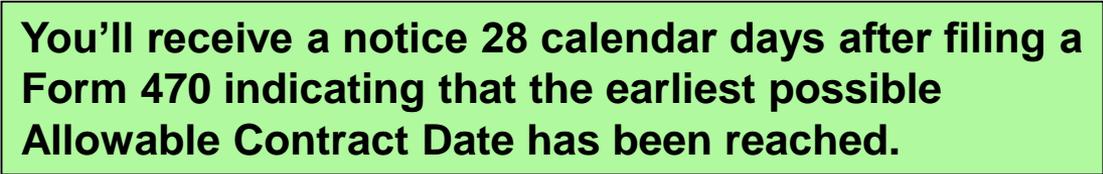
The Allowable Contract Date for FCC Form 470 #180008563 has been reached. You may now close your competitive bidding process unless state and local procurement laws require you to keep the bidding open longer.

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 470 and open the attached document to learn more about how to evaluate bids and select your service provider.

[Form 470 Dashboard](#)

Thank you,

Universal Service Administrative Co.



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

NOTE: Please do not reply to this email

This message has been sent by EPC

BID EVALUATIONS (1/2)

Don't make any decisions or sign contracts until your Allowable Contract Date (ACD) has passed

- 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.
- You may contact vendors to request cost proposals after filing the 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 cost as the primary factor

- You should respond to requests for additional information needed to create a responsive bid.
- 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 respond.
- You may disqualify certain bids if you stated those disqualification factors on the Form 470.
- You may consider relevant State Master Contracts as bids – while they may purchase internet or phone services from the KIH3 contract, **public libraries are NOT eligible to purchase off the KETS equipment contracts for Kentucky schools.** Some vendors for those contracts may offer to match the pricing offered to schools.



Sample Bid Evaluation Matrix

Hover over each paragraph on the right to see the area of the bid evaluation matrix with which it corresponds.

FACTOR	POINTS AVAILABLE	VENDOR 1	VENDOR 2	VENDOR 3
Price of the eligible products and services	30*	15	30	25
Prior experience with the vendor	20	20	0	20
Prices for ineligible services, products, and fees	25	20	15	25
Flexible invoicing: FCC Form 472 or FCC Form 474	15	0	15	15
Local or in-state vendor	10	10	8	7
TOTAL	100	65	68	92

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

List of Disqualified Bidders:
Vendor 1
Reason for disqualification: All interested bidders received two weeks' notice of a required pre-bid conference. Vendor 1 did not attend this conference and did not provide a reason for their absence.

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."

Vendors are rated on how well they meet each factor. Point values for all factors are totaled for each vendor.

In this sample, Vendor 3, with a total of 92 points, is the winning bid because that vendor has the highest total points.

If a bidder is disqualified, the reason for disqualification should be noted for that vendor (see the "List of Disqualified Bidders" below the matrix).

For more information on constructing a bid evaluation, visit the USAC website at: <http://usac.org/sl/applicants/step02/default.aspx>

<https://www.usac.org/wp-content/uploads/e-rate/documents/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: <http://e-ratecentral.com/applicationTips/bidAssessment/CompetitiveBidResponseDocumentation.asp>
- 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 have to modify the spreadsheet to reflect the factors important to their situation.

PRODUCT ELIGIBILITY QUESTIONS

Check with the vendor or manufacturer to ensure that you understand the E-rate eligibility for the product/service listed on the cost proposal

- Example: Firewalls – while the firewall appliance (hardware) is generally 100% E-rate eligible, the firewall license for security features and content filtering isn't. Sometimes the appliance and license are sold as a bundle that is partially eligible – check the SKU.
- Search online for the manufacturer's E-rate page – they sometimes have eligibility lists by SKU or have an email address to contact for eligibility questions.

DOCUMENT RETENTION – SAVE IT ALL!

- Save **everything** 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 all 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.

WRAP-UP

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LOOKING AHEAD – THE FORM 471

- **The Funding Year 2020 Form 471 will likely be released in mid-January 2020 and stay open through mid- to late March 2020.**
- Prior to filing the Form 471, your library must complete the competitive bidding process and sign a contract or make a legally-binding agreement with the vendor(s) chosen through the bidding process.
- Be prepared to upload the contract or agreement and also to provide verification of square footage for Category Two budgets if needed (blueprints, signed letter from architect, city records, etc.)
- KDLA will announce training on the Form 471 through the listservs.

RESOURCES

KDLA's E-rate page

- <https://kdla.ky.gov/librarians/programs/e-rate/Pages/default.aspx>

USAC Schools & Libraries homepage

- <https://www.usac.org/e-rate/>

USAC Client Service Bureau

- 1-888-203-8100 or through your [E-rate Productivity Center](#) account

E-rate Central

- <https://e-ratecentral.com/>

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: join-kytech@listserv.ky.gov

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



KDLA's E-rate consultations and training are made possible in part by the Institute of Museum and Library Services (IMLS) through the Grants to States program. For more information, please visit the IMLS website: <https://www.imls.gov/>.

**No time to waste
– let's get to it!**



**Please complete
KDLA's survey:**
<https://www.survey-monkey.com/r/erate-2020cat2form470>

**For E-rate questions,
contact Lauren Abner.**

lauren.abner@ky.gov

502.564.1728

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