TODAY’S AGENDA

- BRIEF OVERVIEW OF THE E-RATE PROCESS
- ELIGIBLE SERVICES LIST
- COMPETITIVE BIDDING
- CONTRACTS
- DEALING WITH VENDORS
- NAVIGATING THE E-RATE PRODUCTIVITY CENTER
- FILING THE FORM 470
- BID EVALUATIONS
DISCLAIMER: I’M NOT THE FCC

This presentation represents my unofficial interpretation of the FCC’s E-rate rules and regulations. **Official guidance can only come from the FCC and USAC.**
E-RATE PROCESS & IMPORTANT DATES
THE E-RATE PROCESS

Form 470
Competitive Bidding

Form 471
Request Discounts

Form 486
Service Starts

SPI or BEAR
Invoicing Methods

July to Feb
prior to FY

Jan to March
prior to FY

USAC review

July 1 to June 30 of FY

July 1 of FY to Oct 28 after FY

Funding Commitment Decision Letter

Discounts applied to bills or reimbursed after
TIMELINE FOR FY 2017-18

- Competitive Bidding for FY 2017-18 services
  - Opened July 1, 2016
  - Last date to open competitive bidding: 28 days before final Form 471 deadline (TBA – likely late March/early April 2017)

- When Services Will Happen for FY 2017-18
  - Recurring Services (monthly internet, phone, basic maintenance)
    - July 1, 2017 to June 30, 2018
  - Non-recurring Services (Category Two)
    - April 1, 2017 to September 30, 2018
ELIGIBLE SERVICES LIST
WHAT QUALIFIES FOR E-RATE?

• The full E-rate Eligible Services List (ESL) can be downloaded from: http://www.usac.org/sl/applicants/beforeyoubegin/eligible-services-list.aspx

• Eligible services are separated into two broad categories:
  • Category One: Connectivity to the Building
  • Category Two: Connectivity to the Device

• If products/services contain ineligible components, a cost allocation is required to separate out those costs.
CATEGORY ONE - INTERNET

Data Transmission Services & Internet Access

- Monthly Internet fees (DSL, cable, fiber, Wi-Fi, etc.)
- Internet access for bookmobile
- Leased data lines (T1, lit fiber, etc.)
- Self-provisioned broadband networks
- Fees for static IP addresses are eligible as part of your internet access

Category One Services occur between July 1, 2017 and June 30, 2018

No budget limit on Category One requests
**CATEGORY ONE – VOICE SERVICES**

**Voice Services**
- Local, long distance, and 800 (toll-free) service
- Plain old telephone service (POTS)
- Integrated Services Digital Network (ISDN)
- Interconnected voice over Internet protocol (VoIP)
- Radio loop
- Centrex
- Satellite telephone service
- Wireless telephone service including cellular voice and excluding data and text messaging
- Fax service

Category One Services must occur between July 1, 2017 and June 30, 2018

No budget limit on Category One requests

Voice Service discounts are being phased out – subtract 60 from your normal discount rate for FY 2017-18. Several libraries are no longer eligible for these discounts.
Internal Connections

- Cabling, connectors, and related components
- Switches and routers
- Racks
- Access points
- Antennas
- Caching
- Wireless controller systems
- Firewalls (some restrictions apply)
- UPS (Uninterruptible Power Supply)
- Software supporting components on the list used to distribute broadband through the library

More flexibility – equipment can be installed as soon as April 1, 2017 or as late as September 30, 2018.

These eligible functions can be virtualized in the cloud or combined in equipment (like routing and switching).
MANAGED INTERNAL BROADBAND SERVICES (MIBS)

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

BASIC MAINTENANCE

- 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

CATEGORY TWO FUNDING is subject to a 5-year budget specific to each library branch (including kiosks and bookmobiles). Almost all Kentucky libraries can request up to $2.30/square foot in C2 support (pre-discount). A few in densely populated areas qualify for $5/square foot. Budgets can change year to year due to construction.
MISCELLANEOUS

May fall under Category One or Two:

- Taxes, surcharges, and other similar, reasonable charges
- Rental or lease fees for eligible components
- Shipping
- Training
- Installation and configuration
  - May be performed by a 3rd party rather than the vendor who sold the equipment
CHILDREN’S INTERNET PROTECTION ACT

Compliance with the Children’s Internet Protection Act (CIPA):

- Necessary if requesting E-rate support for Internet Access or any Category Two products & services
- Exception: CIPA compliance not required for telecommunications services only (phone, transport)
- Has your library:
  - Implemented a filter that blocks obscene images?
  - Created an Internet Safety Policy that addresses filtering?
  - Held a public meeting prior to adopting the Internet Safety Policy?
POLL TIME
SOUND OFF!
COMPETITIVE BIDDING OVERVIEW
On the Form 470, applicants describe the E-rate eligible services they need. Potential service providers have at least 28 days to respond with bids.

- No decision about which service provider to use can be made before 28 days have elapsed.
- You can wait longer if you want; you may have to 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 principle of E-rate

• 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.
E-rate applicants are required to select the most cost-effective solution for the product or service they’re bidding on.

- In bid evaluations, cost must be the most heavily weighted consideration (receives the most points in the evaluation).
- The least-expensive solution doesn’t always win the bid evaluation; it may not score well on factors other than cost.
- When creating a bid evaluation and scoring bids, the concept of reasonable defensiveness is important:
  - If you explained your bid evaluation to an impartial third-party, could they reasonable come to the conclusion that you selected the most cost-effective solution?
BUSINESS-CLASS INTERNET BIDDING EXEMPTION

A Form 470 for internet access is **not** necessary if ALL these conditions are met:

- Bandwidth is at least 100 Mbps downstream and 10 Mbps upstream
- Pre-discount cost is less than $3600 annually ($300/month), including any installation or other eligible fees
- Service and price are commercially available
Are any of your contracts for E-rate eligible recurring services such as internet, voice services, or mobile data for the bookmobile set to expire any time between July 1, 2017 and June 30, 2018?

- If Yes, you must bid again for these services on a FY 2017-18 Form 470
- Month-to-month or tariff contracts for recurring services must be bid every year.
- You should also bid again if service under the contract has changed substantially since you filed the establishing Form 470 (ex: upgraded internet bandwidth).
Does your library board have to review contracts for internet, voice services, and network hardware before authorizing you to sign them?

- If so, keep in mind the dates of your board meetings in early 2017. You must receive bids for 28 days after filing the Form 470, so at the latest, you need to file the Form 470 a calendar month before your board meeting to file the Form 471 on time.
ALREADY UNDER CONTRACT?

Q: I want E-rate support for FY 2017-18, but I already have a contract that covers all or part of that funding year. Is it possible to get E-rate for that service?

A: Yes, but there are some provisos:

- Your contract must honestly win the bid evaluation.
- You must memorialize your 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 day competitive bidding period.

**THIS IS NOT A GREAT WAY TO DO E-RATE** – The best practice is to file a Form 470, wait at least 28 days, and then make a new contract. Any deviation from this best practice complicates how you enter data on forms and your application review process.
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 20+ years old).

Spelled out in KRS 45A.345–.460

Must bid for contracts and purchases over $20,000, and there must be an adequate notice 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)
If your library doesn’t follow the Model Procurement Code, then purchases over $20,000 must be bid per **KRS 424.260(1)**
- 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.
The Form 470 contains a field for state and local procurement information. Here’s some boilerplate for you to use:

- The Kentucky Model Procurement Code (see KRS 45A.345-.460) and KRS 424.260 require bids for contracts and purchases over $20,000. See http://www.lrc.ky.gov/Statutes/index.aspx for more information.
Save **everything** related to E-rate filing. The document retention period is **10 years from the end of the funding year**.

- FCC Forms
- Any correspondence from USAC or the FCC.
- Copies of bids
- Contracts or agreements with service providers
- Copies of bid evaluation form/decision process for choosing winning bid
- Invoices and proof of delivery, service, etc.
E-RATE PRODUCTIVITY CENTER: UPDATING LIBRARY PROFILES
E-RATE PRODUCTIVITY CENTER

• To set up account or if you have login issues: call the USAC Client Services Bureau at 1-888-203-8100

• Must select a staff member to act as account administrator. Once the administrator is set up in EPC, he/she 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 (www.usac.org/sl) and select ‘Apply for E-rate’ under Resources & Tools on the left. Then look for Log In button (picture on right).
  • Apply for E-rate page links to other resources such as videos.
Before you start filing forms for FY 2017-18, you should make sure the information you have about your library system and its branches is still accurate:

- Has the address, phone, or square footage changed?
  - Update information in the E-rate Productivity Center (next two slides)
  - If the square footage will change before June 30, 2018 due to construction, make sure you have documentation to verify the new square footage.

- Are you opening or closing branches during FY 2017-18?
  - Contact USAC customer service for entity numbers for new branches
  - Consider permanently canceling entity numbers for closed branches once all E-rate invoicing for that branch has been completed.
To update the address, phone, square footage, or other information about your system or its branches, go to My Landing Page and click on the name under My Entities.
On the next page, click on Manage Organization to update and submit changes. NOTE: To update the overall entity for a library system, you will need to look for the Manage Organization option on the ‘more actions’ menu, which has an ellipsis:
FORM 470 — BASIC INFORMATION
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

Can also start a 470 by clicking on the library system, then Related Actions, then Create FCC Form 470
You have the option to permanently discard forms you’re working on. You will receive periodic email reminders from EPC if you leave incomplete forms on your Tasks list.

Use Back button to return to a previous page.

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.
Enter a nickname that will be easy to find on your Task list or when sorting through your library’s completed forms.
The Number of Eligible Entities should include your main library and other branches (kiosks and bookmobiles).

Only the name and BEN for the library system will be listed here because it handles billing for all the branches.
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.
Select which Categories of Service you want to request on this form. You can file separate forms for each type or file for both Categories on the same form—your choice.
USAC uses the terms ‘RFP’ or ‘request for proposal’ for any documents that further describe an applicant’s needs. Such documents are useful when making extensive requests (such as major network equipment upgrades).

• Applicants must upload RFP documents:
  • If such documents have been issued as part of the procurement—you have to upload them in EPC, not merely provide a link to where they are posted elsewhere
  • To request cellular data for the bookmobile; bizarrely, the E-rate program rules do not require this, but applicants are forced to upload something due to an unresolved glitch in the E-rate Productivity Center. Applicants can simply upload a document saying that the RFP is not required for bookmobile data or they can upload a true RFP document. A template for a bookmobile data RFP can be downloaded from the KDLA E-rate page.
  • To request dark fiber/self-provisioning
RFP DOCUMENTS (2/3)

FCC Form 470 - Funding Year 2017

Pioneer County Public Library System - Monthly Internet for FY 2017-18 - Form #170001502

Last Saved: 9/23/2016 4:21 PM EDT

RFPs for Service Requests

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

Yes ✓  No

Choose File allows you to upload documents from your computer. If your RFP contains several documents, you can load a zip file.

Click the X beside the RFP name to remove it.

You must answer the RFP question to move forward; if you indicate Yes, options for uploading files will appear.
If you upload RFPs, you need to indicate which category(s) of service the RFP involves.

### FCC Form 470 - Funding Year 2017

**Pioneer County Public Library System - Monthly Internet fee #170001502**

Last Saved: 9/23/2016 4:23 PM EDT

<table>
<thead>
<tr>
<th>Basic Information</th>
<th>Service Requests</th>
<th>Technical Contact Information</th>
<th>Procurement Information</th>
</tr>
</thead>
</table>

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 ONE services.

- [ ] Bookmobile data RFP 2017

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.

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

- [ ] Bookmobile data RFP 2017

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.
FORM 470 — EXAMPLES OF SERVICE REQUESTS
The Narrative field for each Category allows you to more fully describe your needs to potential service providers. (See later slides for tips on narratives).

Add each service under the appropriate Category. You’ll see only the Categories you indicated on a previous screen.
Select the type of service you’re seeking from the drop-down. Related fields will automatically pop up so you can further describe the service you’re seeking.

Most Kentucky libraries should choose **Internet Access & Transport Bundled** to cover monthly Internet charges.
SERVICE REQUEST DETAILS - INTERNET

<table>
<thead>
<tr>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Access &amp; Transport Bundled</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity*</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit</td>
<td>Circuits</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Minimum Capacity*</th>
<th>25 Mbps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Capacity*</td>
<td>100 Mbps</td>
</tr>
</tbody>
</table>

Choose Yes to cover other potential fees for setup and tech support of your Internet service.

Minimum capacity should be your current download speed. Maximum capacity should be set to your desired higher speed.

In this example, 2 entities are served because the library system has a main branch and an administrative building.

If an RFP relates to the particular service request, check the box.

Click Add when you’ve answered all questions.

Put in how many circuits are needed.
CELLULAR DATA FOR BOOKMOBILE

List a range here, but you can be more specific about capacity in an RFP. Also, remember this is the speed of the connection, not the amount of data allotted to the account each month.

You must attach your bookmobile data RFP to this request.
You must select Service Type, then Function.

Internal Connections requests must always include ‘or equivalent’ due to E-rate bidding rules and will be included automatically if you choose an option besides ‘No Preference’.
Specific manufacturers are listed on BMIC because you’re seeking service on Category Two equipment you already own or intend to purchase. You can provide more specifics about what you own and what you need in the Narrative field.

It’s usually a good idea to bid for BMIC on any equipment you’re trying to purchase in case you want to take advantage of optional technical support packages vendors will try to sell you. If you don’t end up purchasing BMIC later, no big deal.
EDITING/REMOVING A SERVICE REQUEST

Check box beside the request you want to edit or remove. You may select only one request at a time.

Choose to Edit or Remove the request you selected.
For Category One, you have to answer a question about installments for special construction. It’s doubtful any Kentucky libraries will request special construction, so most likely the answer is No.
FORM 470 — CRAFTING A NARRATIVE
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 potential service may have.

A detailed narrative field also 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 NARRATIVE (1/2)

- **NOT** an exhaustive list:
  - **Contract dates** – What is the desired start date for the contract? This is good to include if your current contract ends mid-year.
  - **Internet speeds** – What are the minimum downstream AND upstream bandwidths you’re seeking? Do you need burstable bandwidth at particular times?
  - **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.
  - **Voice services** – If you’re asking for cellular voice services for staff, are there ineligible costs you’d like the service provider to cost allocate (like texting, data)? Does one of your phone lines need to be for fax service? Do you have a preference for VoIP?
WHAT TO INCLUDE IN NARRATIVE (2/2)

- NOT an exhaustive list (continued):
  - **Bidding** – Do you have any specifics about how you want bids to be submitted or formatted? You can also emphasize that cost proposals should reflect the Lowest Corresponding Price (LCP), GSA (federal) pricing, or any pricing available to governmental units.
  - **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)?
    - Disqualification factors **must** be clearly listed on the Form 470 and must be binary (Yes or No answers)
    - See the [12/15/15 SL News Brief](#) for more on disqualification factors

- The narrative field is limited to 5,000 characters. If you need more space to describe your needs, consider uploading an RFP document.
EXAMPLE NARRATIVES

• Narrative for Category One – Internet Access & Transport Bundled:
  • The Pioneer County Public Library system has 2 eligible entities for Internet Access & Transport Bundled. The Main Branch located at 100 Main Street, Boonesburg, KY 40069 needs a minimum of 50x50M internet, and our branch library at 300 Tulip Poplar Lane, Loganville KY 40078 needs a minimum of 25x3M internet. Please provide quotes for all downstream capacities available between 25M and 100M. Vendor must have a SPIN or the bid will be disqualified.

• Narrative for Category Two – Internal Connection
  • The Pioneer County Public Library system has 1 eligible entity for Category Two requests, its Main Branch located at 100 Main Street, Boonesburg, KY 40069. The Main Branch needs: +/- 500 feet of Cat6 cabling; +/- 20 three-foot patch cables; and +/- 1 (one) 48-port PoE switch. Basic Maintenance of eligible broadband internal connections components may include repair and upkeep of eligible hardware, configuration changes, basic technical support including online and telephone based technical support, and software upgrades and patches including bug fixes and security patches. All cost proposals must reflect any available to governmental unit discounts. Each line item on the proposal should clearly list quantity, manufacturer, part number, description, unit price, and extended price. Disqualification factors: proposals MUST include SPIN and MUST separate eligible and ineligible services by line item for all services to which service provider responds. Additional points on bid evaluation will be given to vendors that offer Service Provider Invoicing (SPI/Form 473).
TECHNICAL CONTACT PERSON

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!!!
You should cite KY procurement law in this section.

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

Wait about 1 minute before hitting the Refresh button to access the PDF of your in-process form.

Click the blue link to download a draft. You can send it to other staff members or the KDLA technology consultant to look over before certification.
Best practice: Look at your draft Form 470 again a day or two before certifying it—you can correct a draft 470, but if mistakes are included in a certified 470, you’ll have to release another one and start the bidding process over.

### DRAFT

**USAC**

**FCC Form 470 – Funding Year 2017**

**Billed Entity**

Pioneer County Public Library System  
100 Main Street  
Boonesburg, KY 40069  
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

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<thead>
<tr>
<th>Name</th>
<th>Consultant Registration Number</th>
<th>Phone Number</th>
<th>Email</th>
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### Consultants

<table>
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### RFPs

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<tr>
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<tbody>
<tr>
<td>89748</td>
<td>Bookmobile hotspot RFP</td>
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### Category One Service Requests

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<th>Function</th>
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<th>Maximum</th>
<th>Entities</th>
<th>Quantity</th>
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<tbody>
<tr>
<td>Internet Access</td>
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<td>Internet Access</td>
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<td>10 Mbps</td>
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<td>End-Cost Service</td>
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</table>

### Description of Other Functions

<table>
<thead>
<tr>
<th>Id</th>
<th>Name</th>
</tr>
</thead>
</table>
IF YOU’RE THE CERTIFYING AUTHORITY

Check this box and then choose Continue to Certification.
SEND FORM 470 TO ANOTHER CERTIFIER

Select this button to send the form to the Tasks list of any other full rights users associated with your library for certification.
CERTIFY THE FORM 470

You must agree to all of the certifications to post the Form 470.
CERTIFICATION - WARNING

You’ll be reminded about potential penalties for making false statements.
Your in-process and certified Forms 470 are listed at the bottom of My Landing Page. Form Type drop-down: select FCC Form 470. Funding Year drop-down: select 2017. In the far left column, click on the nickname to view the form.
AFTER THE FORM 470 IS FILED
ALLOWABLE CONTRACT DATE

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

A PDF with instructions on vendor selection will be attached.
**Sample Bid Matrix - USAC**

**Sample Bid Evaluation Matrix**

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

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

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

**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).

**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.

Tips on constructing a bid evaluation:


Find this sample bid evaluation online at

<table>
<thead>
<tr>
<th><strong>SAMPLE BID MATRIX — E-RATE CENTRAL</strong></th>
</tr>
</thead>
</table>

- E-rate Central, the website for a longtime E-rate consulting firm, has a sample bid evaluation matrix: [http://e-ratecentral.com/applicationTips/bidAssessment/CompetitiveBidResponseDocumentation.asp](http://e-ratecentral.com/applicationTips/bidAssessment/CompetitiveBidResponseDocumentation.asp)

- KDLA neither recommends nor discourages applicants to use this particular bid matrix, but it does show a good 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.
ONE BID OR NO BIDS RECEIVED

- If you received only one responsive bid or no responsive bids at all in the 28-day competitive bidding window, make sure to memorialize that fact by sending yourself an email stating that fact. Otherwise, it may appear that you kept only the winning bid rather than all bids that came in.

- Applicants receiving 1 bid or no bids for a particular product or service may contact vendors to request quotes after the 28-day competitive bidding window has ended.

- Remember: If you post a new Form 470 for services previously bid on another 470, you have to throw out any bids collected from the first form you posted.

- The Schools & Libraries News Brief from 12/11/15 has some details on what to do if you get one bid or no bids. 
LOOKING AHEAD — THE FORM 471

• The new Form 471 in EPC will likely be released during January or early February 2017.

• Prior to filing the Form 471, you must complete the competitive bidding process and sign a contract or make a legally-binding agreement with the vendor chosen through the bidding process.

• Be prepared to upload your 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 training on the Form 471 will be provided in early 2017 – check listservs for an announcement.
WRAP-UP
RESOURCES

USAC Schools & Libraries homepage
▪ www.usac.org/sl

USAC Client Services Bureau
▪ 1-888-203-8100 or through your EPC account

KDLA’s E-rate page
▪ http://kdla.ky.gov/librarians/programs/Pages/E-Rate.aspx
  ▪ Updates to this page are coming soon!

E-rate Central
▪ www.eratecentral.com
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.
The Schools & Libraries Program News Brief provides weekly updates on E-rate news, including in-depth tips on various aspects of the application process and the E-rate Productivity Center.

- To sign up, visit [http://usac.org/about/tools/publications/subscription-center.aspx](http://usac.org/about/tools/publications/subscription-center.aspx) (scroll down for Schools & Libraries publications)
COMING ATTRACTIONS

E-rate Category Two Bidding

Thursday, October 20th
10:00 a.m. Eastern/9:00 a.m. Central

Category Two funding for networking equipment and maintenance can save your library thousands of dollars on costly upgrades. Learn about calculating your Category Two budget, using RFP documents, handling vendors, and more. 90 glorious minutes!

Registration Link
FOR E-RATE QUESTIONS, CONTACT LAUREN ABNER.

lauren.abner@ky.gov

502.564.1728