



Learningtech.org

The Miller Institute for Learning with Technology

**E-Rate Consulting Renewal Proposal
Fiscal Year 2015-2016 / E-Rate Funding Year 2016-2017
San Carlos School District**

Learningtech.org appreciates the opportunity to provide Consulting Services to your organization for the past years. We look forward to continuing that relationship and anticipate providing these Standard E-Rate Management Services consistent with the attached Scope of Work during fiscal year 2015 – 2016:

- Y19 (2016-2017) E-Rate Category 1 application preparation and compliance assistance. (For 2015-2016, we assisted with a Category 1 application that requested funding of **\$69,463.73**; additional California Teleconnect Fund discounts are also anticipated for eligible Category 1 services.)
- On-going E-Rate management services to follow-up on FRNs for up to two prior funding years.

Key assumptions to be considered during the next fiscal year's work include:

- No additional schools or sites since last year
- One (1) Category 1 application for continuing contract services
- One (1) Category 1 application for newly competed and awarded services (as needed)
- No funding requests for: cellular voice, cellular data, Basic Maintenance of Internal Connections or services totaling less than \$1000¹
- No Category 2 application
- Client will promptly turn around information requests. Items that may be requested of Client include: copies of service provider invoices, lists of current technology vendors, other existing materials, bid evaluation scores/decisions, signatures on vendor contracts and implementation documents, student enrollment and NSLP data, budget information required by program rules.

Consistent with Paragraph 2 of the existing Consulting Agreement, our agreement ends on 6/30/2015; a new Consulting Agreement is attached to support this renewal proposal. This renewal proposal includes these additional considerations:

- The annual Fixed Fee amount of **\$6300.00** covers the specific E-Rate Management Services Scope of Work (attached) and above assumptions
- At Client's preference, the annual Fixed Fee amount for the fiscal year's work can be paid:
 - In a single payment with 2% discount if paid by 7/10/2015, *or*
 - Quarterly, in 4 installments, due on the 1st day of the first month of each quarter
 - *(Monthly payment option is no longer available)*

¹ This limitation on funding requests is a new Learningtech.org policy effective 7/1/2015, and reflects the reduced value of discounts for these services due to FCC's 2014 Modernization Order.

- Learningtech.org will issue a Prompt Payment Discount to be reflected on the following quarter's invoice when Client selects Quarterly schedule and pays invoice within 10 days of date of invoice. The amount of the Prompt Payment Discount will be 1% of the invoice amount. NOTE: Prompt Payment discount is applicable for cash/check payments, but not for credit card payments
- Additional costs may be incurred if mutually agreed assumptions turn out to be inaccurate or if services are requested that are outside the stated Scope of Work.



Scope of Work – E-Rate Management Services

Standard E-Rate Management Services

Learningtech.org will provide:

- E-Rate application preparation and compliance assistance services for the upcoming E-Rate funding year.
- On-going E-Rate management services to follow-up on FRNs for up to two prior funding years.

Standard application preparation and management services include:

- Confirmation that all administrative foundations are current
- Planning and documentation relevant to required forms
- Management of a fair and open competitive bidding process
- Submission of required forms (470, 471, 486, 472/474)
- Interface with SLD for PIA and service providers regarding invoicing of SLD
- Electronic document retention.

Client Responsibilities

Client will provide:

- A primary and an alternate contact including valid email addresses and either mobile or home telephone numbers to be used by Consultant for the sole purpose of resolving urgent after-hours E-Rate matters
- Availability of at least one of the two designated contacts on six (6) hours notice during the final 2 weeks of the annual filing window,² for e-certification or urgent questions about applications being prepared on behalf of Applicant by Consultant
- Full access to Consultant to the online billing systems of Applicant's telecommunications and Internet service providers, to help ensure that all eligible services are properly discounted by E-Rate
- Timely response to routine information requests (within 3 business days, without reminders). Items that may be requested of Client include: copies of service provider invoices, lists of current technology vendors, other existing materials, bid evaluation scores/decisions, signatures on vendor contracts and implementation documents, student enrollment and NSLP data, budget information required by program rules
- Payments to Consultant on time, so that dunning is not required
- Clear documentation of all relevant existing contracts and "review first option to Consultant" before signing anything relating to telecommunications, Internet access or internal connections "outside the window" that might have E-Rate consequences.

² Each year the E-Rate application-filing window varies slightly. Usually, it is January to March preceding the start of the Funding Year. Exact dates for each funding year filing window are posted on USAC's website, generally with at least 60 days notice (<http://www.usac.org/sl/>).

Extra Cost Services

The following related services are *not* budgeted for in the Standard E-Rate Management Services Scope of Work. These Extra Cost Services are available at extra cost on an hourly basis and include:

- More schools or sites than initially proposed/agreed upon
- Category 2 application if proposal and agreement was for only Category 1 application
- Filing of Waivers or Appeals or Following Up on Pending Appeals in a significant way
- Recovery of Prior Year funds when special circumstances (e.g., invoice deadline past)
- Technology Plan development, revisions, re-writes (including network design)
- Basic/Brief Professional Development relating to E-Rate for relevant staff
- High Scrutiny events (e.g., High Cost Review, On Site Audit, Selective Review, Competitive Bidding Review, Item 26 Review, more than 2 rounds of PIA per FRN, Payment Quality Assurance review, any review including law enforcement)
- On site vendor walk-throughs / site surveys beyond initial engagement kickoff meeting
- Support with implementation of services (e.g., planning of rollout to multiple sites, service installation support)
- Assistance beyond routine checks with other funding sources (e.g., CTF)
- LAN or WAN or WLAN network design in preparation for E-Rate
- Telephone consultation on overall technology strategy and engineering design
- Extra detective work to track down information that should be in existing E-Rate binders from prior years, including PIN numbers, Security Codes for Forms 471, etc. that Applicant is required by program rules to have on file
- Binder Audits to help ensure appropriate document retention
- Follow-up on FRNs from prior funding years more than two funding years old
- Fixing major historical problems (e.g., if a prior year application had significant flaws)
- Service Substitutions / Form 500 filings / Operational SPIN Changes (e.g., due to changes of plans, bankruptcy/failed performance of provider)
- Repetition or “do over” of work already completed due to change “of heart” or circumstances
- More than 1 on-site visit (for the initial engagement kick-off and site survey)
- Funding requests for cellular voice or cellular data
- Funding requests for Basic Maintenance of Internal Connections
- Funding requests for less than \$1000
- More than 2 requests for the same document.

These Extra Cost Services will be provided only if needed, requested and approved, then charged for on an hourly basis – in addition to any normally applicable fixed fees – according to the Labor Rate Schedule. For all services outside of the Scope of Work, hourly rates apply.