



**Learningtech.org**<sup>®</sup>

The Miller Institute for Learning with Technology

## Scope of Work – E-Rate Management Services

### Standard E-Rate Management Services

Learningtech.org will provide:

- Category 1 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 funding requests [FRNs] for up to two prior funding years

Standard application preparation and management services include:

- Confirmation that all administrative foundations are current (e.g., Entity Numbers, Consultant Letter of Agency, Consortium Letters of Agency (if needed), E-Rate Productivity Center [EPC], FCC Registration Numbers)
- Planning and documentation relevant to required forms
- Management of a fair and open competitive bidding process, complying with federal, state and local procurement rules, if needed
- Adherence to all E-Rate program rules and deadlines
- Submission of required forms (470, 471, 486, 472/474)
- Interface with E-Rate program (e.g., Program Integrity Assurance [PIA])
- Interface with service providers to facilitate processing of discounts
- Quality assurance on every published document and form
- Backup electronic document retention<sup>1</sup>

Incremental fees apply for:

- Category 2 E-Rate application preparation and compliance assistance services for the upcoming E-Rate funding year
- More schools or sites than initially proposed/agreed upon

### 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,<sup>2</sup> for e-certification or urgent questions about applications being prepared on behalf of Applicant by Consultant
- Full access to Consultant to the Applicant's accounts for online systems (i.e., the E-Rate Productivity Center [EPC] and service providers' billing systems)

---

<sup>1</sup> The *Applicant* is responsible for document retention for ten years from the last date of service. Consultant's electronic document retention provides backup.

<sup>2</sup> Each year the E-Rate application-filing window varies slightly. Exact dates for each funding year filing window are posted on USAC's website (<http://usac.org/sl/tools/deadlines/Default.aspx>) under FCC Form 471.

- Timely response to routine document/information requests within 3 business days (without reminders). Items that may be requested of Client include but are not limited to: copies of service provider invoices, lists of current technology vendors, bid evaluation scores/decisions, signatures on vendor contracts and implementation documents, student enrollment and NSLP data, technology budget information required by program rules
- Contact information for Client representatives noted on Client Representatives form
- Distribution of **Client Participation Expectations** document to functional heads in own organization to promote awareness of E-Rate deadlines
- Notice to Consultant of discounts being posted to invoices (or not) by 5/1 each year
- Payments to Consultant on time, so that dunning is not required
- Clear documentation of all relevant existing contracts
- Consultant option to review before signing anything relating to telecommunications, Internet access or internal connections “outside the window” that might have E-Rate consequences

### Extra Cost Services

Because they occur infrequently, 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 according to the Labor Rate Schedule and include:

- 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)
- Professional Development relating to E-Rate for relevant staff
- Attendance/participation in Applicant Board meetings
- High Scrutiny events (e.g., High Cost Review, On Site Audit, Selective Review, Competitive Bidding Review, Review of “budgeted amount allocated to resources not eligible for E-Rate support,” more than 2 rounds of PIA per FRN, Payment Quality Assurance review, any review including law enforcement)
- On site visits (e.g., vendor walk-throughs, or site surveys), unless explicitly included
- 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
- Special Construction projects
- 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.
- Audits (e.g., review to help ensure appropriate document retention, USAC Beneficiary and Contributor Audit Program [BCAP], USAC Payment Quality Assurance [PQA])
- Compliance with Child Internet Protection Act [CIPA] requirements beyond review of documentation
- Follow-up on funding requests from prior funding years more than two funding years old
- Fixing major historical problems (e.g., if a prior year application had significant flaws not caused by Learningtech.org)

- Complex Service Substitutions, 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 applicant circumstances
- Funding requests for less than \$1000
- More than 2 requests for the same document
- Additional applications during special E-Rate windows that are separate from the main annual application window

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

### **Labor Rate Schedule**

*Hourly Rates, Applicable to E-Rate Extra Cost Services, Time and Materials Projects or Project Elements  
Effective through June 30, 2023; Adjustable within CPI Annually on July 1*

Category	Rate
Complex Consultations (Chief Technical Officer)	\$275.00
Vice Presidents, Server Installation/Configuration; Network Design, Complex Troubleshooting; Cabling Installation Supervision; Complex Web Programming; Complex Data Manipulation; Senior Instructor	\$225.00
Most E-Rate Application and Tech Plan Preparation work; Instructor	\$175.00
Most Desktop/Laptop/Tablet/Phone Technical Support; E-Rate Application Support; Static Web Page Creation/Editing; Assistant Instructor	\$110.00
Administrative or Clerical Support; Routine Data Entry; Most Intern Labor	\$65.00