# Learningtech.org®

The Miller Institute *for Learning with Technology*

## Scope of Work – E-Rate Management Services

**Learningtech.org will provide:**
- E-Rate application preparation and compliance assistance services for the upcoming E-Rate funding year for these applications, as needed:
  - One (1) Category 1 application for services with continuing contracts
  - One (1) Category 1 application for newly competed and awarded services
  - One (1) Category 2 application for services with continuing contracts
- On-going E-Rate management services to follow-up on funding requests for up to two prior funding years

Application preparation and management services include:
- Confirmation that all needed administrative foundations are current (e.g., Entity Numbers, Letter(s) of Agency, E-Rate Productivity Center [EPC], FCC Registration Numbers, System for Award Management [SAM.gov])
- 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[1]

Incremental fees apply for:
- More schools or sites than initially proposed/agreed upon, or since last year
- Category 2 competitive bidding and application for new products/services (e.g., equipment to facilitate Internal Connections, Basic Maintenance of Internal Connections, Managed Internal Broadband Services for leased or purchased equipment)

**Client will provide:**
- **Information, including Client approval signature, required to complete the E-Rate FY2024 Planning Recap,[2] by 10/4/23**
- Client Representatives form verified/updated annually, or as changes occur, including a primary and an alternate contact with valid email addresses and cell numbers
- Full access to the Applicant's E-Rate accounts for online systems (e.g., EPC)

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

[2] The E-Rate FY2024 Planning Recap(s) for (Funding for dates of service 7/1/2024 – 6/30/2025) summarizes planning meetings, and any follow-up conversations or emails. These documents govern all subsequent E-Rate actions Learningtech.org will execute on behalf of Client for the upcoming E-Rate funding year.

- ***Prompt*** response to routine document/information requests (without reminders). Items that may be requested of Client (Learningtech.org can help identify the appropriate documents) include but are not limited to:
  - Student enrollment and NSLP counts
  - Technology budget information required by program rules
  - Copies of service provider invoices and countersigned contracts
  - List of current technology vendors
  - Bid evaluation scores/decisions, signatures on vendor contracts and implementation documents (when competitive bidding is needed)
- Payments to Learningtech.org on time, so that dunning is not required
- Sufficient opportunity to Learningtech.org to review every document relating to E-Rate eligible products/services, before signing (critical to ensuring compliance)

Additional Services

Because they occur infrequently, the following services are *not* budgeted for in the routine E-Rate Management Services Scope of Work. These Additional Services are available at extra cost on a time and materials basis according to our *Labor Rate Schedule* and include:

- Filing of Waivers or Appeals or managing pending Appeals
- Recovery of Prior Year funds for special circumstances (e.g., invoice deadline missed)
- LAN, WAN, or WLAN network design in preparation for E-Rate
- Consultation on overall technology strategy, engineering design, curricular or pedagogical considerations
- Technology Plan development or revisions
- Professional Learning for client staff regarding E-Rate program or other topics
- Learningtech.org attendance/participation in Client 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, any review involving law enforcement)
- On site visits (e.g., vendor walk-throughs), unless explicitly included in proposal
- Support with implementation of services (e.g., planning of rollout to multiple sites, service installation support), including modest travel arrangements as needed
- Assistance beyond routine checks with other funding sources (e.g., CTF, ECF)
- Special Construction or installment arrangements on large C2 projects
- 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 routine review of current status and documentation
- Follow-up on funding requests from prior funding years more than two funding years old
- Addressing 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 service provider)
- Change Order or "do over" of work already completed due to change of applicant circumstances or preferences

- Additional applications during special E-Rate windows that are separate from the main annual application window

Additional Services will be provided only if needed, requested, and approved, then charged for on a time and materials 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, these hourly rates apply. Normally, the only "materials costs" would be in situations where Learningtech.org personnel must travel to the school/district site.

## Labor Rate Schedule

*Hourly Rates, Applicable to E-Rate Extra Cost Services, Time and Materials Projects or Project Elements*
*Effective through June 30, 2024; Annually adjustable to reflect inflation on July 1*

| Category | Rate |
|---|---|
| Complex Consultations (Chief Technical Officer) | $300.00 |
| Vice Presidents; Server Installation/Configuration; Network Design, Complex Troubleshooting; Cabling Installation Supervision; Senior Instructor; Complex Web Programming; Complex Data Manipulation | $245.00 |
| E-Rate Application Support; Tech Plan Preparation Assistant; Instructor | $190.00 |
| Most Desktop/Laptop/Tablet/Phone Technical Support; Back Office Support; Static Web Page Creation/Editing; Assistant Instructor | $120.00 |
| Administrative or Clerical Support; Routine Data Entry; Most Intern Labor | $70.00 |