Learningtech.org®
The Miller Institute *for Learning with Technology*

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 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
- Adherence to all E-Rate program rules and deadlines
- Submission of required forms (470, 471, 486, 472/474)
- Interface with E-Rate program for Program Integrity Assurance [PIA] and service providers regarding invoicing of E-Rate program
- Quality assurance on every published document and form
- Backup electronic document retention.[1]

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 Applicant's accounts for online systems (i.e., the E-Rate Productivity Center [EPC] and service providers' billing systems)
- Timely response to routine document/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, bid evaluation scores/decisions, signatures on vendor contracts and implementation documents, student enrollment and NSLP data, budget information required by program rules

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[1] Per http://usac.org/sl/tools/document-retention.aspx, the Applicant is responsible for document retention for ten years from the last date of service. Consultant's electronic document retention provides backup.

[2] 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).

- Contact information for Client representatives noted on Client Representatives form
- 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 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.

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 according to the Labor Rate Schedule 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, 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
- 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.
- Binder Audits to help ensure appropriate document retention
- Compliance with Child Internet Protection Act [CIPA] requirements beyond review of documentation to confirm acceptability
- 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)
- Complex 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 circumstances
- 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, 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, 2019; Adjustable within CPI Annually on July 1

Category	Rate
Complex Consultations (Chief Technical Officer)	$195.00
Vice Presidents, Server Installation/Configuration; Network Design, Complex Troubleshooting; Cabling Installation Supervision; Complex Web Programming; Complex Data Manipulation; Senior Instructor	$175.00
Most E-Rate Application and Tech Plan Preparation work; Instructor	$150.00
Most Desktop/Laptop/Tablet/Phone Technical Support; E-Rate Application Support; Static Web Page Creation/Editing; Assistant Instructor	$95.00
Administrative or Clerical Support; Routine Data Entry; Most Intern Labor	$55.00

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