

E-rate Program

Before the Bid

May 7, 2013 – Atlanta
May 9, 2013 - Los Angeles

- Program roles
 - Applicant
 - Service provider
 - Consultant
- Service provider activities:
 - During applicant technology planning
 - Before applicants post FCC Form 470

- **Program roles for an applicant**
 - Write technology plan (Priority 2 services only)
 - File FCC Form 470 and write RFP(if necessary)
 - Evaluate bids
 - Select the service provider(s)
 - Document the competitive bidding process
 - File FCC Form 471 and Item 21 attachment
 - Get technology plan approved
 - File FCC Form 486
 - Select invoice method (BEAR or SPI) / File BEARs
 - Retain documentation

- Program roles for a service provider
 - Respond to FCC Forms 470 and RFPs
 - Negotiate and sign contracts for contracted services
 - Assist with preparing Item 21 attachments
 - Provide technical answers during application review on questions regarding specific goods and services requested, but NOT on competitive bidding
 - File FCC Form 473 (SPAC Form)
 - File SPIs and/or approve BEARs
 - Retain documentation

- Program roles for a consultant
 - Consultant roles follow the role of the consultant's client
 - Either applicant or service provider – not both
 - Obtain a consultant registration number
 - Retain documentation

- Applicants receiving Priority 2 services must write technology plans

Service providers can:

- Refer applicants to existing sources (e.g., state DOE or state library, public website) for help
- Offer NEUTRAL advice

Service providers cannot:

- Write the applicant's technology plan
- Assist in the writing or preparation of the applicant's technology plan

Before FCC Form 470/RFP

- Applicants post FCC Forms 470 – and may issue RFPs – to open a competitive bidding process. **BEFORE** the FCC Form 470 is posted, service providers:

- Can offer product demonstrations
- Can provide information about product offerings
- Can refer applicants with questions to existing sources of information

- Cannot provide sample RFPs or RFP templates to applicants
- Cannot offer gifts outside of the exceptions provided in the program's gift rules

- Service providers should review:
 - Program rules on
 - Lowest Corresponding Price (LCP)
 - Competitive bidding
 - Gifts
 - Eligibility of the products and services they offer, especially if eligibility is conditional or proportional
 - Applicable state and local procurement rules and regulations

- If USAC finds out the competitive bidding process is not open and fair:
 - This would violate program rules and will lead to funding denials
 - USAC will investigate suspected noncompliance, which will take time and hold up decisions on other applications